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ABSTRACT

Professional fundraising has given rise to a new information specialist profession. This career path, which has been known as prospect research or advancement research, should be more accurately characterized as information resources management for advancement. With primary emphasis on value-added information processes that involve analysis and synthesis of a wide variety of data, advancement researchers must function as information resources managers for the fundraising and advancement efforts of nonprofit institutions. This paper describes the current status of the profession through a review of its professional literature and an analysis of the results of a number of membership surveys conducted between 1988 and 1998 by the Association of Professional Researchers for Advancement (APRA). This analysis seeks to provide the profession with a knowledge base upon which to chart its future. Individuals with graduate degrees in library and information science represent a relatively small minority of the membership. They need to assume a leadership role within the organization and to draw on the literature and professional status of the special library and information science fields to assist the membership of the APRA in gaining professional recognition and parity within the several fund raising careers. Copies of some of the APRA surveys are appended. Bibliographies of related journal articles and Internet sites are included. (Contains 96 references.) (Author/MES)

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ADVANCEMENT INFORMATION RESOURCES MANAGEMENT: AN INFORMATION UNDERSTANDING PROFESSION IN SUPPORT OF PHILANTHROPY

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A Master's Research Paper submitted to the
Kent State University
School of Library and Information Science
in partial fulfillment of the requirements
for the degree of Master of Library Science

by

Anne E. Mayer

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ABSTRACT

Professional fund raising has given rise to a new information specialist profession. This career path which has been known as prospect research or advancement research should be more accurately characterized as information resources management for advancement. With primary emphasis on value-added information processes that involve analysis and syntheses of a wide variety of data, advancement researchers must function as information resources managers for the fund raising and advancement efforts of non-profit institutions.

This paper describes the current status of the profession through a careful review of its professional literature and an analysis of the results of a number of membership surveys conducted between 1988 and 1998 by the Association of Professional Researchers for Advancement. This analysis seeks to provide the profession with a knowledge base upon which to chart its future. Individuals with graduate degrees in library and information science represent a relatively small minority of the membership. They need to assume a leadership role within the organization and to draw on the literature and professional status of the special library and information science fields to assist the membership of the Association of Professional Researchers for Advancement in gaining professional recognition and organizational parity within the several fund raising careers.

Master's Research Paper by

Anne E. Mayer

B.A. Wittenberg University, 1969

M.A., University of Delaware, 1975

M.L.S., Kent State University, 1999

Approved by

Advisor Thomas J. Froehlich Date 7/16/99

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This project has given me the opportunity to review the formation of my profession, to establish its place among the many career paths of the information age and to delight in the affirmation of the pivotal role value-added information provision can play in the philanthropic process.

I would like to recognize the faculty of the School of Library and Information Science for the special guidance and encouragement it provides to mid-life students. I am greatly indebted to Dr. Thomas J. Froehlich who introduced me to both the theory and practice of information science and from whose guidance I have benefitted over a several year period.

Wittenberg University where I serve as Director of Advancement Information Resources has permitted me to combine my professional responsibilities with academic pursuits. My colleagues in the Advancement Office have provided constant encouragement and support.

Finally and most importantly, my return to the world of academe has received the constant support of my husband, Albert and my mother, Evelyn Pence.

CHAPTER 1

INTRODUCTION

Just as the nineteenth century saw the creation of many types of new industrial occupations unknown to the earlier agricultural economy, so the late twentieth century has witnessed the development of career paths unique to the developing "information age." Professional fund raising, itself largely a twentieth century phenomenon, has given rise to a new information driven profession, advancement research. Like information science itself, the advancement research profession is still working toward a universally accepted name. In its short life span it has been called prospect research, advancement services, advancement information resources, development research and development services. Its practitioners have been given titles ranging from clerk to director.

This paper seeks to describe the current status of this profession and to document its place among the specialized information career paths that have proliferated in the twentieth century. The author has chosen to adopt the more descriptive term, information resources management for advancement over the most commonly used of the several terms, advancement research, as preferred terminology. The term advancement research is still too closely associated with the ancillary function of prospect research. The data from the 1997 professional survey will demonstrate that this function represents only a fraction of the information services provided by practitioners of this occupation. The project will encompass a review of the professional

literature relative to advancement information resources management, the historical development and publications of the Association of Professional Researchers for Advancement (APRA), and will conduct an analysis of the results of the several membership survey's conducted by APRA with special emphasis given to the last major survey which was conducted in 1996 and 1997. Since this profession has developed outside of the mainstream library and information science disciplines, the paper will suggest avenues of mutual interest and concern and ways in which the older and more securely established information science disciplines can offer guidance to the advancement information resources management field.

Advancement information resources management defined

To understand the nature of advancement information resources management one must first understand the nature of non-profit fund raising which is variously called advancement or development.

> Development is a process. When done properly, it is the deliberate and thoughtful meshing of closely related activities. It is not haphazard or quixotic. Wishful thinking has little place in a well-organized development program. The energies of a great many people, both staff and volunteers, must be guided in meaningful ways to secure gifts successfully over and over again.
>
> It is axiomatic in fund raising that the best solicitation occurs when the right prospect is asked for the right gift by the right solicitor at the right time in the right way. One of the most important elements in the fund-raising process is determining all of these "rights." For that to occur, research is essential.[1]

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[1]Alfred Blum, Jr., "An Introduction to Prospect Research," chap. in *Prospect Research: A How-to Guide*, ed. Bobbie J. Strand and Susan Hunt (Washington, DC: Council for Advancement and Support of Education, 1986), 1.

In professionally staffed fund raising offices , it has become, in large measure, the responsibility of the advancement information resources management staff to determine who is the right prospect and to assist in the matching of all the other factors which must come into play to result in a successful solicitation. In the 1980s the field was more commonly known as prospect research since the focus of the effort was gathering information about the financial ability and personal funding interests of those with the potential to be major benefactors.

However, the terminology has broadened in the 1990s in recognition of the fact that many other information functions beyond information gathering on prospects are included under the rubric of advancement information resources management. It can include everything from planning special events, to database information retrieval to office operations support but its core functions are grounded in the challenge of providing information-related services to non-profit organizations with the very specific goal of maximizing the effectiveness of their constituent relations and fund raising activities.[2]

The concept of a separate professional career path for providing information services to fund raising offices developed in the 1970s, however, the idea that specific kinds of information can facilitate the cultivation and solicitation process is as old as the practice of asking for gifts itself. Indeed, one of America's greatest philanthropists, John D. Rockefeller, Jr. was himself a volunteer fund raiser and transfered business axioms to his volunteer work. In 1933 in an address dealing with fund raising to the Citizens Family Welfare Committee in New York he said:

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[2]Ellen Ryan, "Speaking Out: Advancement Services Managers Discuss the Prospects, The Problems, and the Promise of the Profession," *CASE Currents* 17 (June, 1991), 24.

> It is a great help to know something about the person whom you are approaching. You cannot deal successfully with all people the same way. Therefore, it is desirable to find out something about the person you are going to – what his interests are, whether you have any friends in common, whether he gave last year, if so, how much he gave, what he might be able to give this year, etc. Information such as this puts you more closely in touch with him and makes the approach easier.[3]

Educational institutions have lead the way in developing information management techniques to support fund raising. Identifying and cultivating donors with the ability and the inclination to give large sums of money is critical to an institution's capability of achieving excellence in an era of escalating costs and limited tuition increases. Thousands of individuals may be screened, rated, researched and reviewed to isolate the very small number of major donors whose gifts can determine the future of an institution.

Historically, advancement information resources management grew out of record keeping needs of constituent relations departments. In the late nineteenth and early twentieth centuries alumni associations developed and with them record keeping systems to track the addresses and the donations of alumni. From ledger books, to card files to address-o-graph plates to computer databases, these records have been a driving force behind fund raising activities in American colleges and universities. Its alumni are an institution's key constituent group. Keeping track of their whereabouts is central to the ability to ask them for financial support and that support has long formed the lion's share of donations.

As competition for America's philanthropic dollars has increased, the kinds of information services provided have become both more varied and more sophisticated. The types of services

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[3]Helen Bergan, *Where the Money Is: A Fund Raiser's Guide to the Rich* (Alexandria, VA: Bioguide Press, 1992), 10.

provided range from database management, data entry, gift and pledge processing and report generation to electronic screening and ranking of potential donors and customized research profiles on prospective donors.

Maintenance of the internal, largely computer-based records regarding alumni and other constituencies has developed far beyond the mere tracking of names and addresses. A variety of "turnkey" database systems as well as customized in-house databases facilitate the tracking of hundreds of individual data elements. These records serve to augment the traditional paper files which educational institutions have historically maintained. These "alumni records" generally contain both correspondence and news clippings and begin building as soon as the individual graduates from the institution.

Beyond internal documentation, information on the constituent pool of any organization can be found in a wide variety of publications and public records. Major biographical and business directories, newspaper and periodical indexes, trade and professional journals are all possible sources of additional information. Increasingly these sources are accessed in online rather than print format. These kinds of external sources form the major information source for non-alumni constituencies including parents, individual "friends," and corporations and foundations. Information regarding corporate and foundation donors broadens the scope of information sources to the entire array of business reference tools. Corporate and foundation giving has spawned an industry of specialized reference materials which document grant histories and policies.

The end of the 1980s saw the development of an entirely new group of information products designed for the fund raising sector. These include an extensive range of electronic screening

products based on the market segmentation techniques of the huge national marketing databases such as Polk, R. R. Donnelly and Claritas Corporation. These products, initially based on home address zip codes and census track information, now include a vast array of "household specific" data gleaned from marketing surveys, motor vehicle registrations, and magazine and catalog subscriptions. More recently vendors have developed products which screen constituent lists for such attributes as stock and securities holdings or yacht or private plan ownership. Increasingly real estate records are being computerized and services have developed to access an individual's holdings by county or even by state.

The fact that this information exists does not mean that it is necessary or relevant to successful constituent cultivation and solicitation. The advancement information resources management profession is addressing the issue of both the economies and the ethics of prospect information and have stressed relevance to the fund raising process as the key criteria for information presented in advancement information resources management.[4]

This author was particularly intrigued with an analogy presented by Wurman in the book *Information Anxiety*:

> The information *transmission* business and the information *storage* business are not the same as the information *understanding* business. An understanding business is a service that makes data and information useful, applicable and approachable.[5]

This short paragraph seems to capture the essence of the varying levels of service advancement information resources management provides to the fund raising community. Utilizing a

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[4]James W. Bennetts, "Too Much of a Good Thing," *Connections* VI, no.5 (1994): 1-2, 8-12.

[5]Richard Saul Wurman, *Information Anxiety* (New York: Doubleday, 1989), 7.

combination of paper and computer-based media they store vast amounts of information regarding the institution's constituencies. They receive incoming data from a broad range of transmitting agencies both internal and external. They also transmit data themselves to both internal departments and external professional associations. However, their most crucial function is that of analyzing and synthesizing constituent data and repackaging it in a form that is relevant to the needs of fund raising professionals.

The major professional associations of the field of fund raising including the Council for the Advancement and Support of Education and the National Society of Fund Raising Executives have included advancement information resources management, or at least the prospect research component of it, in their publications, conferences and training activities from the early 1980s. However, since its formation in 1988, the American Association of Prospect Researchers now the Association of Professional Researchers for Advancement (APRA), has served as the real focus point for discussion, training and definition of the profession. Its newsletter, journal, conferences and conference proceedings have formed the core of reference material regarding both the nature of the profession and the nuts and bolts of its day to day practice. The analysis of the data gained in the several surveys it has conducted of its members forms a key component of this paper and permits the author to fully explore the nature of the profession as characterized by the responses of its members.

Advancement Information Resources Management and the Information Professions

Certainly as the membership of APRA strives to clarify its professional scope and identity it can benefit from a careful review of that portion of the literature of information science devoted to the conceptualization of the discipline. Since advancement information resources management offices function in a professional environment in which marketing and constituency relations are the central focus of the majority of the staff, the literature of the information science and special library fields can provide vital reassurance that other professional groups and scholars are grappling with both the ideas and the activities that define the role of the advancement information resources management professional. Such readings can reaffirm both the legitimacy of the information need that was the catalyst for the formation of advancement information resources management departments and provide an intellectual grounding removed from the problems of the daily routine.

Every group of information professionals must surely take pride in the words of Vannevar Bush in his classic article, "As We May Think," when he envisions the development of "a new profession of trail blazers, those who find delight in the task of establishing useful trails through the enormous mass of the common record."[6] While perhaps in less picturesque language, many scholars since Bush have provided insight into the nature of information systems

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[6]Vannevar Bush, "As We May Think," *Atlantic Monthly*, 176 (1), 1945, 108.

and the professionals who create and maintain them. Robert Taylor's concept of value-added-processes exactly captures the information need that lead to the formation of advancement information resources management offices in the late 1970s:

> The major — perhaps *only* as this book argues — reason for the existence of an information system is to store and to provide information and knowledge in usable chunks to those who presently or in the future will live and work in certain environments, and who, as a result, have or will have certain problems which information may help in clarifying or even solving[7].

In an era in which computer systems have increased visibility in fund raising offices, advancement researchers would certainly be in agreement as Taylor goes on to affirm the importance of the human element in the design of effective information systems:

> An information process is a series of steps by which inputs are altered, grouped, tagged, enhanced, stored, and/or displayed in some form (output) for the use of someone outside the system. In our terminology, this should be a valued-added process, a series of activities that enhance input. These processes may be either machine or human based. As we will argue, from the user or customer viewpoint those that are human based will tend to produce outputs that are more valuable.[8]

Information science's efforts to define and differentiate itself from traditional library science reinforce the concept of information professional as an intermediary. The concept of the "deinstitutionalization" of the discipline speaks to the very kind of service provided by advancement information resources departments. Robert Taylor called for the profession to

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[7]Robert Taylor, *Value-Added Processes in Information Systems* (Norwood, NJ: ABLEX Publishing Co., 1986), 24.

[8]Ibid., 28.

"move from a 'Ptolemaic' universe with the library at the center to a 'Copernican' world view with information at the center and the library but one of the satellites."[9]

In outlining his vision of library and information science education, F. W. Lancaster also emphases the necessity of deinstitutionalization. His discussion also predicts the development of specialized fields like advancement information resources management.

> It seems likely that the information professionals of the future must be more specialized in terms of the subject matter they deal with. Very possibly they will be expected to perform an "information analysis" type of function: searching, selecting the best of the information retrieved and submitting the evaluated results to the requester.[10]

Another area of study in the field of information science that clearly has great applicability to advancement information resource management has been that of the literature of information resources management. Forest W. Horton, Jr. coined the term "information counselor"[11] which also resonates well with those involved in information provision to fund raising staffs.

More recently Chun Wei Choo has provided a vivid depiction of the goals of this discipline:

> The goal of information management is to develop processes, structures, and systems that function both as the circulatory system that filters and distributes nourishing information throughout the organization, and as the central nervous system that synthesizes incoming

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[9]Robert S. Taylor, "Reminiscing About the Future: Professional Education and the Information Environment," *Library Journal*, 104 (September 15, 1979): 1871.

[10]F. W. Lancaster, "Implications for Library and Information Science Education," *Library Trends*, 32(Winter, 1984): 343.

[11]Horton, Forest Woody, Jr. "The Emerging Information Counselor," *ASIS Bulletin*, (June, 1982): 16.

> information into representations and interpretations for collective action . . . Learning to be intelligent begins by learning how to manage information.[12]

This topic brings forth another natural link in the between the information professions and their literature and fund raising, the writings of the special library field. The concept of analysis of data has long been the expected norm for special librarians. Miriam A. Drake views that expectation as a natural connection between information management and special librarianship as she speaks to the long history of such work in the special library setting:

> Discussing the value of special libraries, Handy in 1911 stated, '. . . it is the power to furnish required and necessary information where it will do the most good at the right time and in the right shape, with a minimum expenditure of time and energy on the part of those whose busineess it is to use the information when furnished.' Clearly, Handy recognized that the job of gathering, synthesizing, and summarizing information in accordance with the needs of the information user is the job of the special librarian.[13]

Indeed, long before the computer catapulted human kind into the information age, another special librarian, Charles B. Fairchild, chose direct language with a folksy twist to amplify this concept which is so vital to special librarian and advancement information specialists.

> This need is not for librarians, who can supply a given date or find sensible answers to the million fool questions that are asked every day. In truth, it has little to do with the library as such, but a great deal to do with the individual man or women who has the analyzing knack; that is to say the ability to dig up all the factors involved in the special problem in

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[12]Chun Wei Choo, *Information Management for the Intelligent Organizations: The Art of Scanning the Environment, 2d ed.*, (Medford, NJ: Information Today, Inc., 1998), 231.

[13]Miriam A. Drake, "Information Management and Special Librarianship," *Special Libraries* 73 (October, 1982): 225, citing D. N. Handy, "The Earning Power of Special Libraries," *Special Libraries* 2:5 (January, 1911).

hand, to separate the essential from the non-essential and to present in the first degree of condensation all the facts pertinent thereto.[14]

The following review of the literature of prospect research will illustrate that Fairchild's colorful prose has captured the goals of advancement information resources management in a nutshell.

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[14]Charles B. Fairchild, Jr., "The Opportunities of a Special Librarian, " *Special Libraries* 6 (April, 1915): 91.

CHAPTER 2

A REVIEW OF THE LITERATURE

Any review of the literature of advancement information resources management and its subsidiary field of prospect research must begin with the 1986 volume, *Prospect Research: A How-to Guide*, edited by Bobbie J. Strand and Susan Hunt[15]. This small volume has set the agenda for discussion about this field since its publication. Strand has elaborated and refined the ideas outlined here in dozens of articles and conference presentations. Strand speaks from the personal experience gained as Director of Prospect Research at Kalamazoo College and as a partner in a major consulting firm has continued to champion both the disciplines of advancement research and the individuals who practice them. While the volume used the prospect research terminology, the topics addressed outlined the broad range of value-added information processes now subsumed under the label of advancement information resources management. The volume addresses the philosophy and the ethical concerns of the discipline and also provides a thorough grounding in the "how-tos" of the processes involved. It is somewhat dated now, in that computer-based resources and on-line services have made major changes in

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[15]Bobbie J. Strand and Susan Hunt, eds., *Prospect Research: A How-to Guide* (Washington, DC: Council for Advancement and Support of Education, 1986).

the day to day activities of advancement researchers, but the conceptual undergirding is as valuable as ever.

Strand's commitment to excellence in the field, has resulted in a legacy of ideas and instruction which is now updated annually by the production of *BIBLIOGRAPHY: Resources for Prospect Development* published by the consulting firm, Bentz Whaley Flessner. This volume is released annually at the international conference of the Association of Professional Researchers for Advancement. It is viewed as the definitive work of its type in the field. This extensive topical bibliography includes general references regarding the discipline as well as an exhaustive listing of all types of resources from public records to traditional print sources to the latest in on-line references. In the true spirit of providing not simply quantity but, more importantly, quality information, it is well annotation and indexed. It is regarded as "required reading" by advancement information resources officers around the world.[16]

Strand's work had been preceded in 1979 by *Prospecting: Searching Out the Philanthropic Dollar*. Produced by one of the major publishing houses in the field of philanthropy, Taft Corporation, this work by Elizabeth Koochoo provided a solid review of the major research tasks of the discipline but lacked the passion and the contextual setting of the later Strand volume.[17]

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[16]Bobbie J. Strand, ed., *BIBLIOGRAPHY: Resources for Prospect Development, 1998-99*, (Minneapolis, MN: Bentz Whaley Flessner, 1998); This work has been published since the early 1980s. It now serves as a chronicle of resources applicable to advancement information services as well as the literature of the discipline itself.

[17]Elizabeth Koochoo, *Prospecting, Searching Out the Philanthropic Dollar.* (Washington, DC: Taft Corporation, 1979).

James K. Hidi.ey edited the second addition of this text in 1984. But only the forward and a brief introductoryerhapter did anything to establish the raison d'etre of advancement research. However, Hickeyavid draw helpful parallels to business applications of information resources management as vstil as stressing that the central focus of this kind of work must be "developing useful informatioco not copious data." [18]

The mid-19%w ts saw the publication of another solid "how-to" work when the Fund-Raising Institute publisheo-a two-volume set, *Fund Raising Research*. The first volume, *How to Find Philanthropic Prs, pects*, was written by former prospect researchers, Jeanne B. Jenkins and Marilyn Lucas. prwas presented as a "practical manual" and serves that process well with an organizational sty le that leads the novice researcher through the various processes of the craft. The second volur*I* ., *FRI Prospect-Research Resource Directory*, was an annotated bibliography of reference sour s.[19]

In light of thouthorough coverage provided by these early works, and also due to the fact that the formation of tR: APRA in 1988 provided newsletter and conference outlets to explore and expand the underng.nding of the discipline, the field did not see another comprehensive treatment of the work of thessrofession until the publication of *Prospect Research Fundamentals* in 1997. This compact voluine builds on the earlier works but brings the reader up to date with a very

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[18] James ke:Hickey, ed., *Prospecting, Searching Out the Philanthropic Dollar*, 2d ed., (Washington, DCCraft Corporation, 1984), 1.

[19]Jeanne LinJenkins and Marilyn Lucas, *Fund-Raising Research, Volume 1: How to Find Philanthropic Prs, pects*, (Ambler, PA: Fund-Raising Institute, 1986).; *Fund-Raising Research, Volume 2: FRI P1-kspect-Research Resource Directory*, (Ambler, PA: Fund-Raising Institute, 1986); A second i oition of the resources directory was published in 1991.

helpful chapter on "The Role of Technology in Prospect Research" which addresses the impact of on-line databases and Internet resources on the field.[20]

Not surprisingly specialized works in the field of fund-raising have offered targeted views of advancement information resources management to fit specific types of efforts. For example, Aspen's Fund Raising Series for the 21st Century volume *Capital Campaigns: Strategies That Work* includes a chapter on the research function. This and others like it form helpful summaries when fund-raisers are reviewing readiness for special projects.[21] Other texts like *The Development Officer in Higher Education: Toward an Understanding of the Role* help place all the varying development functions within the larger higher education environment.[22]

Some authors have become particularly identified with an information-driven approach to fund-raising. Foremost among them is Judith E. Nichols. Her works have not only emphasized the effective gathering and utilization of prospect related information but they lead the way in calling for the use in the fund raising arena of recent developments in the analysis of demographic trends and information sources focused on ways in which to identify affluence.[23]

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[20]Michel Hudson, ed., *Prospect Research Fundamentals*, (Sioux City, IA: Stevenson Consultants, Inc., 1997).

[21]Andrea Kihlstedt and Catherine P. Schwartz, *Capital Campaigns: Strategies that Work (Gaithersburg, MD: Aspen Pulishers, Inc., 1997).*

[22]Michael J. Worth and James W. Asp II, *The Development Officer in Higher Education: Toward an Understanding of the Role*, (Washington, DC: The George Washington University, Graduate School of Education and Human Development, 1994)

[23]Judith E. Nichols, *Targeted Fund Raising: Defining and Refining Your Development Strategy*, (Chicago: Precept Press, Inc., 1991); Judith E. Nichols, *Growing from Good to Great: Positioning Your Fund-raising Efforts for BIG Gains*, (Chicago: Bonus Books, Inc., 1995).

Nichols makes the distinction between contribution tracking systems and true development information systems.

In addition to bringing new developments in the field of demographics to bear, Nichols extensive reading in the field of philanthropy also yields intriguing historical observations:

> Take the advice from America's first fund raiser, Ben Franklin. He advised an eager colleague 'to apply to all those whom you know will give you something; next to those whom you are uncertain whether they will give anything or not, and show them the list of those who have given; and lastly, do not neglect those who you are sure will give nothing, for in some of them you may be mistaken'[24]

In her most recent work: *Transforming Fundraising: A Practical Guide to Evaluating and Strengthening Fundraising to Grow with Change*, Nichols suggests an approach that in the field of information science would be classed under information resources management and builds on many of the same themes as those expressed by Choo in *Information Management for the Intelligent Organization.*[25]

Many advancement information resources professionals find *American Demographics* provides a convenient monthly magazine format for keeping in touch with demographic trends, particularly those dealing with affluence. Book length works can also be of great help whether they are highly specific like *Why the Wealthy Give: The Culture of Elite Philanthropy*[26] or more

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[24]Judith E. Nichols, *Pinpointing Affluence: Increasing Your Share of Major Donor Dollars*, (Chicago: Precept Press, Inc., 1994), 66.

[25]Judith E. Nichols, *Transforming Fundraising: A Practical Guide to Evaluating and Strengthening Fundraising to Grow with Change*, (San Francisco: Jossey-Bass Publishers, 1999); Choo, *Information Management for the Intelligent Organization.*

[26]Francie Ostrower, *Why the Wealthy Give: The Culture of Elite Philanthropy* (Princeton, NJ: Princeton University Press, 1995).

general like *The Millionaire Next Door: The Surprising Secrets of America's Wealthy* which demonstrated that the truly well-to-do do not necessarily have extravagant lifestyles.[27]

Other works targeted at the professional fund raising community are aimed at identifying information sources and refining research skills. Helen Bergan is unique among all the authors who have focused on development research in that she is an experienced reference librarian and former Chief of the Biography Division of the District of Columbia Public Library. Bergen's command of the wide variety of possible sources make this a valuable resource but her insight into the process and its overall purpose is equally valuable:

> The material gathered by the prospect researcher needs to be compiled and documented in an organized way so it literally becomes a "Who's Who in Philanthropy" unique to that organization. The best of all lists of the wealthy is your own list. It is the list which must keep growing if the organization is to continue to function.[28]

Bergan has added another handy desk reference to the field with the publication of *Where the Information Is: A Guide to Electronic Research for Nonprofit Organizations*.[29] While those trained in information science or those coming from a library background will find these works helpful compendiums of largely tried and true reference sources, their great utility to the field of advancement information resources lies in the fact that only a small percentage of the professional staff members in these departments come from an information studies background and therefore, need a good grounding in reference sources.

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[27]Thomas J. Stanley and William D. Danko, *The Millionaire Next Door: The Surprising Secrets of America's Wealthy*, (Atlanta, GA: Longstreet Press, 1996).

[28]Bergan, *Where the Money Is*, 225.

[29]Helen Bergan, *Where the Information Is: A Guide to Electronic Research for Nonprofit Organizations*, (Alexandria, VA: BioGuide Pres, 1996).

While print sources are hard pressed to stay current in the highly volatile world of the Internet, they can be none the less helpful introductions to those just entering the field and can serve as affirmations of current practices to those of greater experience. *The Grantseekers Handbook of Essential Internet Sites* is just such a volume. The annotated listing of helpful sites is useful but it is the introductory essay by a working professional who has been at the very forefront of the use of the Internet in advancement research that provides all readers food for thought:

> We felt sure that the investment in learning about this resource would make us better researchers in the long run. . . That investment was not wasted, even if the bleeding edge did claim some casualties. The Internet has not become the hoped for ultimate reference. But it has become vastly more powerful . . . The explosion in electronic data sources, and the need of businesses and nonprofits to make sense of that information and apply it, has created a growing class of workers: the information professional. Prospect researchers, once thought of as clerical workers, have joined this group as professionals in their own right. Sure, anybody can sit down and get a list of hits from a search engine, but it takes skill, training, and practice to craft an efficient search and to select from among the many electronic resources that are available . . . It takes an analytical mind to cull the data, select the useful bits and shape them into information that can be applied to fulfill the organization's goals and mission.[30]

Journal articles also address various types of advancement information resources management issues. In fact, their nature fosters discussion and stimulates the process of clearly defining the role of this arm of the professional fund-raising universe. Few authors have done this with the first line impact of Michael J. Worth, Vice President for Development and Alumni Affairs of George Washington University when he opened his thought piece with: 'For volunteers and others outside the fund-raising profession, prospect research is like a sausage–

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[30]David Lamb, "Living and Researching on Internet Time," in *The Grantseekers Handbook of Essential Internet Sites*, 1999-2000 Edition, (Gaithersburg, MD: Aspen Publishers, Inc., 1999), 12-13.

they appreciate the product but would rather not know the details of how its made"[31] What followed was a thoughtful evaluation of the ethical implications of research and a validation of the necessity of the thoughtful use of prospect information in the cultivation and solicitation process.

Among the various periodicals in the fund raising field *Currents*, published by the Council for Advancement and Support of Education, has consistently included articles relative to advancement information resources management since the early 1980s. Some articles have offered case studies.[32] Many have provided "how-to" reviews for the practitioner which have dealt with applications involving an organization's own internal records as well as reviews of the latest technological developments in the field.[33] Other articles have worked toward a definition

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[31]Michael J. Worth, "Prospect Research: A Tool for Professionalism in Fund Raising," *Fund Raising Management* (June, 1991).

[32]Linda Marks, "Improving Our Prospects," *Currents*, XIII, no. 10 (November/ December, 1987): 38-44.

[33]Robert G. Millar III, "How Much Is That Donor in Your Records?: Step-by-step Advice for Figuring New Worth and Giving Ability," *Currents*, XXI, no. 7 (July/August, 1995): 38-42; Anne M. Pollick, "Survey Sense, " *Currents*, XXI, no 7 (July/August, 1995): 50-54; Paola Trimarco, "Questioning The Questions," *Currents*, XX, no.1 (January, 1994): 32-36.; Kathleen McDonald, "Uncommon Knowledge: Peer Screening" *Currents*, XXIII, no. 7 (July/August, 1997): 30-36; Daniel Turse, Jr. and Jo Anna Norris, " The Foundations of Research," *Currents*, XXI, no. 2 (February, 1995): 31-35; Dennis A. Prescott, "Pinpointing Your Top Prospects," *Currents*, XXI, no.2 (February, 1995): 32-33; Andrew J. Grant and Emily S. Berkowitz, "Knowledge is Power," *Currents*, XIV, no.9 (October, 1988): 6-9; Alan L. Dessoff, "Tinker, Taylor, Private Eye," *Currents*, XVIII, no.5 (May, 1992): 42-45; Carolyn E. Kourosfsky, "The Corporate Connection: Effective Company Research is Just Like People Research, " *Currents*, XIV, no. 5 (May, 1992): 46-49; Ellen Ryan, "Making the Most of the World Wide Web," *Currents*, XXII, no. 6 (June, 1996): 50-51; Bobbie J. Strand, "Getting a Payback from Online Services," *Currents*, XXII, no. 6 (June, 1996): 52-54; Lisa B. Williams, "A Mine of Information: Dig Into Databases for Prospect Research and You May Strike Gold," *Currents*, XII, no.8 (September, 1986): 30-38; Alan L. Dessoff, "The Sophisticated Annual Fund: Dress Up Your Bottom Line by Using Simple Prospect Research Techniques," *Currents*, XIX, no. 6 (June,

of the craft[34] and have also sought to place advancement research within the larger sphere of the fund-raising professionals.[35] Donor motivation, demographic and financial trends that have an effect on fund raising have also been examined.[36]

Some traditional print publishers have begun offering online newsletters. One such publication is "Up to Speed: Trends, Events and Issues in Development Research" which is produced by Taft Corporation. The focus of the format is a monthly essay by former APRA president, Jon Thorsen who is currently Director of Development Research at Princeton University. Thorsen's essays encompass both the theory and practice of information resources management for advancement.[37]

Not surprisingly, the Association of Professional Researchers for Advancement's publications offer one of the richest sources for writing about the field. Articles from the journal *Connections* are augmented by informally published conference proceedings and commercially

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1993):8-14; Gerlinda S. Melchiori, "Ranking Achievement: Use Alumni Data to Identify Your Best Prospects," *Currents*, XIV, no. 7 (July/August, 1988): 52-56; Julie Littlefield and John Glier, "High Tech Major Gifts," *Currents*, XVIII, no. 6 (June, 1992): 22-26.

[34]Ellen Ryan, "Speaking Out: Advancement Services Managers the Prospects, the Problems, and the Promise of the Profession," *Currents*, XVII, no. 6 (June, 1991): 24-28; "What Will the Future Bring?," *Currents*, XXIII, no. 6 (June, 1997): 12-28.

[35]Jean Ann Contore, "Putting It All Together: How Fund Raiser and Researcher Can Cooperate to Make Every Solicitation More Than the Sum of Its Parts," *Currents*, XXII, no. 10 (November/December, 1996): 12-16; Payton R. Helm, "Dogs Watching Television: Or Why Good Advancement Officers Make Bad Technology Managers," *Currents*, XXV, no. 5 (May, 1999): 11-12.

[36].Thomas J. Reilly, "Million-dollar Motivations," *Currents*, XXI, no. 1 (January, 1995): 10-15; David M. Lawson, "Read the Writing on the Wall (Street)," *Currents*, XXV, no. 6 (June, 1999): 20-25.

[37]Jon Thorsen, *Up to Speed: Trends, Events and Issues in Development Research*, [http://www.taftgroup.com/taft/jonintro.html], July 2, 1999.

available audio cassettes of conference presentations. These publications include a number of the standard, practical how-to type reviews but more than any other source APRA literature forms the core of writings about the nature of the discipline. In several instances, they have paralleled themes presented in the larger sphere of information science. The bibliography of this paper will include a listing of *Connections* articles related to the practical, how-to side of the genre. Here we will focus on works that have addressed the conceptual nature of the discipline.

Several other resources provide excellent practical help to advancement information resources professionals at all levels of proficiency. The association has its own web page with an extensive range of explanatory material, and links to archival and other sources. Many individual advancement research offices have created web pages of their own. They offer tours of offices, directories of staffs and links to literally hundreds of web sites which have potential use to the researcher. On they can even provide a "chat room" service.[38]

However, PRSPCT-L , a listserv with ties to APRA, offers constant professional stimulation with discussions largely focused on the practical but also ranging to the theoretical. A dedicated group of APRA volunteers produces the monthly electronic journal, *The Internet Prospector.*[39] APRA also issues the *APRA Bulletin* which covers news of an organizational nature including national board activities and the meetings of regional APRA chapters.

As this profession has sought to define itself, there has been an extremely strong tradition of building the name around the term "research," This was an outgrowth of the need to

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[38] An extensive listing of these sites can be found in the Bibliography of this paper.

[39]Charles H. Lowe, project coordinator, and Pam Patton, editor, *The Internet Prospector*, <http://w3.uwyo.edu/~prospect>, June 2, 1999.

differentiate the processes performed by these offices from their predecessors who had officially performed only clerical and record keeping functions. The early practitioners identified with the "label" researcher since it clearly implied an intellectual, and analytical component over and above careful study and attention to detail.

The formal creation of APRA grew out of the Minneapolis Prospect Research Association. In its January, 1988 incorporation document the founding committee declared that the purpose of the new organization was "to promote and provide education in the area of prospect research to members and to promote networking and a cooperative relationship on a local and national level."[40] By the time of the first meeting of the newly formed national board of directors in February, 1989, the main goal of the association was "to raise the stature of researchers, both in terms of training and in terms of our position in the development profession as a whole."[41] The initial board meeting also established a sub-committee on ethics whose task was to draft a formal code of ethics for membership approval.

Thus in its founding year the association established five themes that have remained at the forefront of its collective discussions: the tasks of the researcher, the nature and status of the profession overall, the role of advancement information resources management within the fund raising profession, the need for professional training and a strong concern with professional ethics and the ethical considerations of the kind of information that profession deals with. More recently, professional literature as begun to address more theoretical themes regarding the nature

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[40]Association of Professional Researchers for Advancement, "Association History, Chapter 3," <http://weber.u.washington.edu/~dlamb/apra/APRA_History.htm>, May 13, 1999.

[41]Ibid. "Chapter 4,"

of information provision and information itself[42] as well as a discussion of the role of technology in information processes. In order to foster professional discussion, the board also established an award for excellence in writing on topics of interest to the profession at its final meeting of 1989.

The initial result of the writing reward was a small volume containing a dozen essays which was published in 1991[43]. At the time it was envisioned as the first in an annual series but, in fact, the journal *Connections* has taken over the role of show casing profession articles in the field.

One of the roles virtually every professional association plays is that of defining what the profession encompasses. The very first essay which appeared in an APRA publications was a discussion of the skills that are needed for excellence in research, especially research as a career path.[44] By the time APRA began developing a profession literature, the nuts and bolts part of the definition was already accomplished:

> For over ten years, the question most asked about prospect research has been, 'How do you ***do*** it?" As we enter the 1990s, fund-raising professionals have come to some consensus about the field, and a shift in emphasis from the general methodology of prospect research to how institutions apply those techniques has become pertinent. The query is now, 'How do ***you*** do it?'[45]

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[42]David M. Steerling, "Beyond Data, Above Information: Knowledge," *Connections* 10, no.2 (Summer, 1998): 18-20; James W. Bennetts, "Too much of a Good Thing," *Connections* VI, no.5 (Special 1994 Year End Issue): 1-2, 8-12.

[43] The American Prospect Research Association, *The American Prospector: Contemporary Issues in Prospect Research, Volume I*, (Rockville, MD: Fund Raising Institute, 1991).

[44]Emily Pfizenmaier Henderson, "Getting and Keeping Good Researchers," *Connections* 3, no. 2 (Spring, 1990): 11-13.

[45]Kim H. Olsad, "The Structure and Role of Prospect Research in Private Comprehensive Universities," in *The American Prospector*, 31.

In analyzing the results of a survey of major universities Olsted noted the need for more involvement on the part of researchers in the planning of the solicitation process and the increasing importance of prospect researchers' input in light of ever more sophisticated information sources. Amy E. Everett built on these ideas in her essay regarding proactive vs. reactive research efforts. She emphasized the need for a team approach between equal partners in noting: "A working partnership between researchers and travel staff will provide a more comprehensive, intensive focus on those individuals most likely to give major gifts by marrying prospect identification with prospect interaction."[46]

Jon Thorsen, an early president of the society, helped place the role of research in the sphere of information professions:

> Development researchers can serve the role of information specialists in the development profession. As we continue to be inundated with all manner of information, and presented with new and challenging methods of accessing that information, we can turn to research for assistance. While the role of gathering data is commonly acknowledged, we also rely on researchers to interpret, organize, communicate, disseminate and increasingly, apply information.[47]

Bobbie Strand summarized the progress of the past two decades in a recent article. She has chosen to use the term "prospect development" as a means of broadening the traditional definition of prospect research and recognizing the variety of roles actually conducted by these practitioners:

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[46]:Amy E. Everett, "Identification of Individual Prospects Through Proactive Research," in *The American Prospector*, 128; other writers have built on this concept including, Kristin Kristopick, "The Proactive Office: A Proactive Approach to Prospect and Donor Services, The University of Connecticut Model," *Connections*, VII, no.1 (Winter, 1994): 1-2, 9-11, 14-16.

[47]Jon Thorsen, "Information Central: Research at the Heart of the Development Process," in *APRA 9th International Conference Session Handouts, August 21-24, 1996*, (San Diego, CA: Association of Professional Researchers for Advancement, 1996), 110.

> The use of technology may be the most visible change in prospect development during the last couple of decades, but it is far from the most dramatic. The strategic thinking and planning undertaken by this group of fund-raising professionals have transformed the outcome of prospect development from a process of finding facts to a comprehensive program including segmentation of the prospect pool, identification of top-level prospects, and an amazing contribution to the corporate intelligence regarding the resulting individuals, foundations, and businesses to form a foundation for sound cultivation and solicitation strategies.[48]

Once prospect researchers found consensus in the nature of their work, they began to explore their role within the total fund raising sphere and their interaction with other fund raisers. Some articles like Debbie Menoher's "Promoting the Research Shop,"[49] are very reminiscent of similar market-your-library articles that have appeared for decades in special library journals. Several articles have stressed cross-departmental communication and the building of communications links as the best approach to positioning the advancement information resources office within the other fund raising area.[50] Diane Crane has taken a management approach to the system. She suggests that reporting structures within fund raising offices are the key to successful partnerships between internal and external staff members, that is to say, between members of the advancement research staff and the front-line fund raisers:

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[48]Bobbie J. Strand, "Prospect Development: Finishing the Century Strong,: *Connections*, 9, no. 2 (Summer, 1997): 8; the concept of researcher as development officer was also addressed in the following: Carolyn E. Kourosfsky, "Prospect Researchers ARE Development Officers," *Connections*, V, nos 2-3 (Winter/Spring, 1993):1, 6-7, 9, 11, 18.

[49]Debbie Menocher, "Promoting the Research Shop," *Connections*, 9, no.1 (Spring, 1997): 4-5.

[50]Roberta E. Werman, "Caution: Development Research Under Construction," *Connections*, 11, no.1 (Spring, 1999): 7-8; Chris Mildner, "What's NOT in the Job Description," *Connections*, 7, no.4 (Winter, 1996): 10; Edward D'Antoni, "Office Politics: The Real Challenge in Prospect Management," *Connections*, 9, no.3 (Fall, 1997): 4-5.

> When researchers discuss their level of satisfaction in their working relationships with other development officers, they often are actually discussing their organizational chart. Those who find themselves in a low-lying stem or on an "ancillary" rather than a "main" branch usually have a greater sense of dissatisfaction in their working relationships with front-line fundraisers. Those who are closely affiliated with front-line officers and are similarly placed on the organizational chart often report more satisfaction in interacting with their colleagues.[51]

Education and training opportunities were factors which triggered the formation of APRA. By 1991 *Connections* offered the following mission statement:

> The American Prospect Research Association is a national organization for people interested in the field of prospect research. The goals of this organization are to facilitate education about research, to encourage professional development among its members and to advance cooperative relationships.[52]

In 1993, *Connections* recommended training seminars offered by two leaders in the field of information brokering, Sue Rugge, and Helen Burwell.[53] Unfortunately, no strong links have developed within the profession suggesting training in information science as an appropriate field of study. As the 1997 survey results will demonstrate only a small percentage of APRA's membership has information science or library backgrounds. The small number of articles in APRA publications regarding training needs have failed to mention MLS or MLIS programs as a logical avenue of study. They have either directed readers to APRA's conferences or the training seminars offered by the National Society of Fund Raising Executives or the Council for

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[51]Diane Crane, "Prospect Research and the Organizational Chart," *Connections*, 8, no,4 (Winter, 1997): 18-19.

[52]"Mission Statement"APRA Board of Directors, *Connections*, (Fall, 1991): 2.

[53]"IPI Seminars of Interest to Development Research," *Connections*, V, no.4 (Summer, 1993): 11.

Advancement and Support of Education[54] or they have suggested pursuing graduate studies resulting is masters degrees in business administration, public administration, or non-profit management.[55] It is astounding to this author that a profession of information provision would not naturally turn to graduate studies in information science. As a whole, the advancement information resources profession has a very traditional "institutionalized" view of librarians as the keepers of places one visits in answer to very specific information needs rather than individuals performing a wide variety of value-added information services.

By the mid-1990s the Board of APRA had appointed a task-force to study the issue of professional certification. However, after much debate and following a survey of the membership, it was decided in 1994 that the association was not yet ready to pursue this option.[56] In 1996 the Board of APRA took another approach to education needs, in establishing a Skills Set Task Force. Following board approval the completed document was distributed to the membership in May, 1998[57]. The accompanying letter noted:

> Together these skills sets serve as more than a guide to planning course offerings for APRA conferences and chapter meetings. We can use them to chart our individual

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[54]Claire Verrette, "Developing Prospect Research Education Programs," *Connections,* VI, no. 2 (Winter, 1994): 8-10.

[55] Elizabeth D. Spenser, "Take This Job and . . . Go To School," *Connections,* V, no. 2-3 (Winter/Spring, 1993): 1, 4-5, 8, 18-19.

[56]American Association of Professional Researchers for Advancement, "Association History, Chapters 8 and 9," December, 1997, [May 13, 1999].

[57]Association of Professional Researchers for Advancement, "Basic Skills Set," *1999 Resource Manual,* (Westmont, IL: Association of Professional Researchers for Advancement, 1999): 9-11; Association of Professional Researchers for Advancement, "Advanced Skills Set," *1999 Resource Manual,* (Westmont, IL: Association of Professional Researchers for Advancement, 1999):12-13; Appendix A contains the text of the Basic Skills Set; Appendix B contains the text of the Advanced Skills Set.

professional development, to identify the skills needed in job applicants and to illustrate to our colleagues the variety and extent of skills and knowledge necessary to be a productive, successful prospect researcher.[58]

The document was divided into a Basic Skills Set and an Advanced Skills Set. Even the "basic" skills set has the ring of a job description for an entry level reference librarian. In addition to knowledge regarding the nature and status of the employing institution and fund raising in general note the following items:

- Understanding of the role information plays in prospect development throughout the prospect cultivation cycle.
- Understanding of what constitutes relevant and strategic information and how to analyze the data to support prospect development.
- Proficiency in locating relevant information in a variety of formats: including hard copy, telephone calls, online and conversations with staff and volunteers
- Proficiency in locating additional resources by asking questions of librarians, government employees and colleagues.
- Proficiency in acquiring appropriate, sound information that is affordable for a non-profit fund-raising operation.
- Knowledge of primary resource providers (online and hard copy; government and commercial; internal and external).
- Understanding of electronic resources and their uses, including CD-ROMs, online services and the Internet.
- Understanding of information management in a database structure, particularly the ability to manipulate and retrieve data.
- Proficiency in synthesizing material from multiple sources into a coherent and accurate presentation.[59]

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[58]Diane Crane and Kate Fultz and others to the Membership of APRA, May, 1998, typescript letter, Association of Professional Researchers for Advancement, Westmont, IL, Collection of the author.

[59]Association of Professional Researchers for Advancement, "Basic Skills Set," 9-11.

The Advanced Skills Set added proficiency in a business and financial research as well as an understanding of government documents related to reporting requirements for corporations and foundations. It also requires "proficiency with legal documents such as wills and charitable trusts." and greatly expands the management criteria from the basic level.[60] The concepts of these skills sets are also very similar to those proposed by the Special Libraries Association.[61]

The skills set also include the qualifier the that individual be familiar with the ethics statements of APRA and other fund raising organizations. From the initial board meeting, ethics has been a prime concern of both the leadership and the membership of the organization. The first ethics statement[62] was presented to the members of APRA in the Spring, 1992 issue of *Connections*. This statement was refined and expanded with a second version which was released in October 1998.[63] Both demonstrate a profession fully aware of the power and potential of the information they use and one genuinely concerned over balancing privacy rights with the needs of the institutions which employ them.

Ethics has been a recurring topic for articles in *Connections*. The entire Spring 1996 issue was devoted to the topic. The issue included case studies and several thoughtful essays on the development of standards, both personal and institutional, as well as gauges for

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[60]Ibid., "Advanced Skills Set," 13.

[61]Marcy Murphy, ed., *Future Competencies of the Information Professional*, (Washington, DC: Special Libraries Association, 1991).

[62]The complete Ethics Statement is included in Appendix C; American Prospect Research Association, *1993 Membership Directory*, (Westmont, IL: American Prospect Research Association, 1993): 4-5.

[63]The complete text of this ethics statement is reprinted in Appendix D; The Board of Directors of the Association of Professional Researchers for Advancement, "APRA Statement of Ethics," *Connections* 10, no.4 (Winter, 1999): 34.

appropriateness.[64] For the past two years it has been the topic of a regular column. Not surprisingly the articles have dealt with the development of personal and corporate value systems which emphasize dignity and respect for the individual.[65]

Like any information focused occupation in the late twentieth century, advancement information resources professions are continually dealing with new developments in information technologies. Like Robert Taylor and others in the field of information science they have expressed the need to balance the equation in favor of the human side as regards to system management and information needs. In examining researchers roles in major capital campaigns, Donna K Freddolino adds a new item to the advancement information professional skills set:

> The information technology industry itself contains some interesting parallels to advancement operations. With technology increasingly specialized into arcane divisions such as imaging, Internet access, office automation, database management, telecommunications, network management and hardware, users often find themselves in a situation where no one is responsible for actually making all the parts work together. In the information technology business, one of the fastest growing sectors is the role of 'integrator'[66]

Other authors have warned that technology is far from a cure-all. In fact, society's current fascination with the computer can actually diminish the professional standing of the researcher

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[64]Kathleen Foley, "Ethics and the Prospect Researcher: Structural Engineering 101," *Connections* 8, no.1 (Spring, 1996): 4-5; Jon Thorsen, "Putting Your House in Order," *Connections* 8, no.1 (Spring, 1996): 6-7; Christina Pulawski, "Ethical Dilemmas: Some Case Studies,: *Connections* 8, no. 1 (Spring, 1996): 8-10; Walter H. Verdooren, "A Measure for Appropriateness, " *Connections* 8, no.1 (Spring, 1996): 11; Beverly Goodwin, "Selected Bibliography for Ethics in Fund Raising," *Connections* 8, no.1 (Spring, 1996): 14-15.

[65]Susan Sweeney Flaherty, "Thinking Critically in a Crisis, " *Connections* 9, no.4 (Winter, 1998): 12; Jonathon A. Lindsey, "A Foundation for a Code of Ethics," *Connections* 10, no.1(Spring, 1999): 30.

[66]Donna K. Freddolino, "Technology Transformation: The Role of Research in Creating a Solid Campaign Information Systems Infrastructure, " *Connections* 8, no.2 (Summer, 1996):10-13.

when colleagues fail to comprehend the skill involved in online research or credit the machine with analytical abilities. " The fact that information is now stored electronically leads many intelligent, well-educated people to believe that "the computer" actually collects and updates that information, just as a person would, except faster, cheaper and better.[67]

In 1995 APRA changed its name and adopted a new mission statement. The name change reflected the fact that the "American" terminology was no longer appropriate with a growing membership in Canada and other members in Europe. It also recognized the fact that surveys were showing closely defined prospect research occupied only a relative small portion of the professional activities of most of its members. The revised mission statement dropped the term prospect entirely: "The mission of the Association of Professional Researchers for Advancement is to foster professional development and promote standards that enhance the expertise and status of development research and information service professionals worldwide."[68] Both practice and policy have placed APRA and its membership firmly in the ranks of the information specialist professions.

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[67]Carolyn E. Kourofsky, "Seduced by Technology: A Cautionary Tale, " *Connections* VI, no.1 (Fall, 1993): 5.

[68]Association of Professional Researchers for Advancement, "APRA Mission Statement," *1996 Resource Manual* (Westmont, IL: Association of Professional Researchers for Advancement, 1996), 5.

CHAPTER 3

THE DATA AND THE METHODOLOGY

The Association of Professional Researchers for Advancement has conducted several surveys of its membership. However, each time thorough analysis has proved difficult in a largely volunteer driven environment. This study will seek to augment the simple tabulation of the 1997 survey and to place those responses wherever possible within the context of other surveys of the profession. Unfortunately, the raw data is only available for the 1997 survey. For all other surveys only the published results are available.

The concept of surveying fund raising offices to determine the nature of advancement information resources management pre-dates the formation of APRA. A study in the Council for Advancement and Support of Education publication *Currents* reported the results of a survey of 56 major research universities in 1986. However, this work does not permit much correlation with later surveys since it was directed at the senior development officer of the institutions rather than the research staffs. It is most interesting in that it paints a picture of advancement research at a time when the impact of online databases and the computer was only just beginning to be felt. While it focused more of the definition of the processes than the people and their skills, it

ended with the recognition that prospect research had become an integral part of the fund raising process and one that needed careful additional examination and research.[69]

As is fitting for a profession of information gatherers who also have a strong component of information synthesis and analysis, APRA's first national conference in September, 1988 also brought its first membership survey. Of the slightly over 200 individuals attending the conference some 122 returned a completed survey. The results were published in *Connections* later that year.[70] *Connections* also reported the results of a APRA-Minnesota Chapter Survey done in early 1991[71]

The first comprehensive survey of the entire APRA membership was mailed in November, 1991 with analysis of the results mailed to the entire membership in April, 1992. Of the 1298 questionnaires mailed 628 useable surveys were received.[72] This survey was conducted in conjunction with the Indiana University Center on Philanthropy and has the most complete analysis of the results.

Although the Indiana University Center on Philanthropy was also involved in the analysis of the 1994 survey, database problems resulted in the loss of the detailed data and a full analysis was never completed. The executive summary mailed to the membership in October,

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[69]Georgiana L. Borton, Maragaret A. Duronio, and Bruce A. Loessin, "Names and Numbers, " *Currents*, XIII, no. 9 (October, 1997): 34-36.

[70]"Results of Income and Job Survey," *Connections* 2, no.1 (Winter, 1988-89): 4-5.

[71]"Chapter News, Minnesota," *Connections* (Summer, 1991): 5.

[72]American Prospect Research Association, "Membership Survey, April 1992" (Arlington, VA: American Prospect Research Association, 1992):1.

1995 is the only record available.[73] It reported responses in graphs and percentages only. The figures focus on demographic considerations. No data is available for the results of the major portion of this survey which focused on the processes of research and the nature of the resources used.[74]

In January 1995 the author was named to the APRA Membership Services Committee with the charge to consider the issues involved in surveying the membership, review the problems of data handling, and develop a new survey document which could be used as a template for future membership surveys.[75] Committee members began a review of both the 1991 and 1994 surveys as well as a survey instrument used by APRA's New York chapter.

By April 1996 the board of APRA had decided to implement another comprehensive project and the author was asked to chair the effort. The national board and particularly the current, Michel Hudson, and in-coming, Napoleon Hendrix, Membership Services Directors provided oversight and direction. At this point, it was still hoped that detailed analysis could be performed on the 1994 data so continuity in questions was a major concern.

The author presented a first draft of the survey instrument to both Membership Services Directors at the national APRA conference in August. All three individuals were concerned about the lack of clear budget guidelines but elected to proceed. The final draft was agreed upon

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[73]American Prospect Research Association, "APRA 1994 Survey, Executive Summary," (Westmont, IL: American Association of Prospect Association, 1995):1.

[74]A copy of the complete 1994 membership survey can be found in Appendix E.

[75]Michel Hudson, APRA Membership Services Director to Anne E. Mayer, January 27, 1995, Columbia, Missouri typescript. Collection of the author.

by late November. It consisted of a 4-page general membership survey and an inserted two-page survey which focused specifically on Internet use.[76]

In addition to the general concern of continuity of categories between surveys, the focus of the effort was to identify as accurately as possible a demographic and salary profile of the membership. Questions about educational background, training preferences, APRA services and membership in other organizations were included to assist the board in long-range planning. The Internet Use survey while meeting the above requirements was especially designed to be an informational vehicle by which the membership could gauge their personal use of this relatively new and very dynamic tool against that of the membership as a whole. All questions were posed with both their utility for APRA board strategic planning and their usefulness in attracting and retaining vendors at national conferences.

In spite of careful review by a number of individuals, there were typographical errors in the survey instrument which might impact the quality of the returns. For example: The questions regarding both tenure in advancement research and tenure in fund raising have a potential overlap between categories. The ranges presented were 1 to 2 years, 2 to 5 years, 5 to 10 years and over 10 years. In a truly international organization the ethnic category African American should drop the national qualifier.

In the section of the survey which sought information regarding the budget levels of the research office, an entire range ($250,000 - $499,999) was omitted. While relatively few offices reach that level, those who fell into this category had to insert the missing option. Twenty-nine surveys reported this range.

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[76]The full Survey instrument is presented in Appendix F and the Internet Use insert is found in Appendix G.

As will be demonstrated as we review the individual results, advancement information professionals seem inclined to the extremely specific in any list of options. Many responses to the questions which provided an "other" option could be generalized to one of the available choices. But for many respondents, if the terminology was not an exact match, they chose to use the "other" option with an explanatory note. Likewise, the respondents were quite selective in the questions by chose to answer. As will be noted as we address the specifics, respondents frequently elected to leave some questions unanswered. In the case of the section dealing with budgeting concerns the number of unanswered and not sure returns approaches the majority of the returns. Another factor which makes exact quantitative analysis of the returns difficult is the very lack of semantic specificity within the terminology used to describe both the profession as a whole and the scope of its several ancillary parts. Since terms such as prospect and/or advancement research can be and are both narrowly and broadly defined it is difficult in the space of a survey document to be sure that the individual respondents are using the term uniformly. In an attempt to determine what each respondent's definition includes the committee added the question which asks: "What functions are included under the research for advancement umbrella at your institution?"

The surveys were mailed in late December, 1996. They went to 1503 current members of APRA. However, there were still no clear budget figures for data processing and analysis. By spring 735 useable surveys had been returned, and still the critical decisions of what software package would be used and who would enter the data had yet to be determined. The national management group suggested and purchased Microsoft *Access*. The author set about designing forms to assist the "call-in, temporary" staff who would be doing the data entry. Since the author was a novice at *Access*, in April 1997 the *Access* forms were sent to technical staff members at

the University of California, Irvin (the employer the APRA Membership Services Director) for final refinement. However, when they were completed in late summer, the APRA national management group decided that the *Access* approach would be too costly since it would take considerable data entry time!

The management group processed the 735 forms independently using *dBase* without reviewing the database design with any of the committee members. When they distributed the tabulations to Hendrix and Mayer, it was clear that their database design was severely flawed for the kind of analysis APRA intended. The staff involved in the actual data processing had made each question a separate field within one enormous record rather than making the individual respondent the unit on which the data set was based. Therefore, the only reports possible were arithmetic totals of the responses to each level of each question. Relationships such as those between gender and salary, size or type of institution and budget levels were impossible to explore.

In light of the fact that the data was now a year old, the association decided to publish in January 1998 what was currently available, the total counts for each variable.[77] The completed original survey forms, now totaling 745, were then forwarded to the author in the hope that eventually volunteer time would enable a more complete analysis. The original *Access* database was used to re-enter all 745 responses. This time the records were keyed by respondent. A unique system-generated identifier was used for each record , this system assigned number was

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[77]Association of Professional Researchers for Advancement, "APRA 1997 Membership Survey Results," (Westmont, IL: Association of Professional Researchers for Advancement, January 30, 1998).

copied on to each form as the data was transcribed. In this way regular spot checks were carried out to assure the accuracy of data entry.

In view of the design of the earlier surveys, the format in which the previous findings were published and the general characteristics of the questions asked, the author has chosen basic types of analysis; focusing mainly on percentages. The analysis has therefore been accomplished using Microsoft Office 97 *Access* and *Excel*.

One additional collection of survey data is available. In October, 1998 following the recent national conference a brief two-page survey was mailed to the entire membership. The focus of this survey was to gather data to assist the board in judging how well the publications of the association were meeting the needs of its members.[78] However, the instrument also collected information on basic demographic characteristics.

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[78]A copy of this document can be found in Appendix H.

CHAPTER 4

THE PROFILE OF THE PROFESSION

Demographic and Educational Characteristics

In approaching their work, advancement information resources professionals are frequently asking questions of who, what, where and when regarding prospective major donors to their institutions. In a very real sense, APRA's membership surveys have sought to answer the same kinds of questions regarding the practitioners of the craft that the researchers themselves routinely compile regarding major donor prospects: ***Who*** are they demographically speaking? ***What*** does the composite profile of their professional lives look like? ***Where*** do they work and for **what** kinds of institutions? Finally, ***when*** do they consult various kinds of resources and ***when*** do they find time for on going professional development?

As with any survey of this type, the demographic data are the most straight forward items upon which to report. Any one attending either an international APRA convention or a gathering of any of the more than two dozen regional affiliate organizations will immediately recognize that this is overwhelmingly a profession of women. Of the 745 respondents to the 1997 survey 615 (82.55%) were female, 121 (16.24%) were male and 9 individuals (1.21%) chose not to answer that question. These statistics are consistent with those of other surveys. The 1988 conference poll chose not even to ask the question. The 1991 comprehensive membership survey reported

81.4% females and 18.6% males.[79] The 1991 regional Minnesota survey recorded: 85% female, 11% male, and 4% not responding.[80] The executive summary of the 1994 survey said only: As was the case in the 1991 survey, the majority of respondents were college-educated females between the ages of 25 and 44."[81]

The data regarding the age of the respondents is presented in Table 1. These figures are in line with the generalized results reported in 1994. If we look at the 25-44 years cohort it includes 65.77% of the total; if we move the range to the 35 - 54 year cohort we encompass 53.69% of all the respondents.

TABLE 1
APRA 1997 Membership Survey Results
Age Range Responses

Description	Number Responding	Percent
No Answer	12	1.61%
Under 25	16	2.15%
25-34	249	33.42%
35-44	241	32.35%
45-54	159	21.34%
55-64	64	8.59%
65 or more	4	0.54%
Total	745	100%

[79]"APRA 1991 Survey Results," 1.

[80]"APRA-Minnesota 1991 Survey Results," 5.

[81]"APRA 1994 Survey Summary,"1.

The range spreads were different for the 1991 survey however, if any thing, the profession is getting more concentrated in the middle years. The 1991 returns reported nearly 2% of respondents over 65[82] while in the 1997 survey this group accounts for only .54%. Perhaps the 5 year span of time between the two surveys is not great enough to show the expected aging of a stable group of individuals. But the lack of upward movement could suggest that older individuals are leaving the profession or at least membership in the association. However, the data is not really sufficient in this area. It might be that higher paid positions elsewhere in fund raising are attracting the more mature individuals or perhaps longer tenured or older members of the society are less likely to complete survey documents.

The 1997 survey is the only one which inquired about ethnicity. Table 2 shows an overwhelming Caucasian population. The African American cohort is particularly under-represented in relation to their ratio in the United States general population. Only 26 of the 745 respondents indicated that they were African American. Those answering "other" to this category, who also took the time to note their exact ethnic background, generally indicated a mixture of races, Caucasian/African American or Latino/Asian, for example.

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[82]"APRA 1991 Survey Results," 1.

TABLE 2
APRA 1997 Membership Survey Results
Ethnicity

Description	Number Responding	Percentage
No Answer	21	2.82%
Caucasian	678	91.01%
African/American	13	1.74%
Hispanic	6	.81%
Asian	15	2.01%
Native American	4	.54%
Other	8	1.07%
Total	745	100%

Contrary to the speculation offered in the analysis of the age of advancement information resources personnel, the data on length of tenure in the field seems to indicate that individuals are remaining in the profession. In the report of the 1988 survey only 2.46% of the respondents indicated that they had been involved in prospect research for more than 10 years.[83] However, in the 1998 mini-survey, of the 266 responding, 51 or 19.17% indicated they had been in the field

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[83]"APRA 1988 Survey Results," 5.

over 10 years. This is one of the very few questions that has consistently appeared in every survey. This results are posted in Table 3.

TABLE 3
APRA Survey Results - Length of Involvement in Research

Survey	No Answer	under 2 years	2 to 5 years	5 to 10 years	over 10 years
1998	6.02%	27.07%	25.56%	22.18%	19.17%
1997	1.74%	27.78%	30.34%	29.93%	10.20%
1994	N/A	24.00%	37.00%	28.10%	10.90%
1992	N/A	31.70%*	37.30%*	22.60%	8.40%
1988	N/A	64.75%*	22.13%*	10.66%	2.46%
Note: The 1991 and 1988 surveys used 3 years as the break point.					

The 1997 responses to the related query of length of membership in APRA seems to indicated that individuals are working in the field sometime before they joint the organization. This data also seems to support the few that long-term APRA members seemed less likely to have returned the completed survey. Hopefully this data is indicative only of the fact that they have built up a resistance to professional surveys and not a general lack of interest in their professional association. Clearly with the preponderance of individuals at the bottom of the chart APRA will chose to continue basic skills conference tracks and basic "how-to" articles in *Connections*. The society leadership will also note that it is the institutions not the individuals who pay the membership dues with 683 (91.68%) of those responding indicating that the dues were paid by their employer.

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TABLE 4
APRA 1997 Survey Results - Length of membership in APRA

Response	Number Responding	Percent
No Answer	11	1.48%
Under 1 year	153	20.45%
1-2 years	158	21.21%
2-5 years	246	33.02%
5-10 years	164	22.01%
Charter Member	13	1.74%

The figures for the total years of involvement in fund raising would seem to support the theory that a portion of the members have been involved in fund raising longer than they have been associated with the information services component of it.

TABLE 5
APRA 1997 Membership Survey - Length of time in fund raising

Response	Number Responding	Percent
No Response	41	5.53%
Under 1 year	30	4.04%
1 - 2 years	74	9.87%
2 - 5 years	206	27.76%
5 - 10 years	244	32.88%
Over 10 years	147	19.81%

As would certainly be expected in an information oriented profession, APRA members have traditionally come from the ranks of the college educated with a substantial proportion reporting graduate degrees as well. In the 1988 survey 45.08% held bachelor's degrees and another 39.39%

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held a graduate degree.[84] The 1991 survey, 58.2% reported bachelor's degrees and another 29.1% held a graduate degree. Of the entire 1991 group 3.3% held an MLS degree. In the 1997 survey, 373 individuals or 50.6% reported a bachelor's degree as the highest level of attainment. Forty-nine individuals had only a high school education and another 45 held an associate degree. Finally an additional 270 (36.24%) respondents to the 1997 survey reported holding graduate degrees. Of this group 58 (7.78%) held graduate degrees related to library and information science. Of those whose highest educational attainment was a master's degree, library and information science was the most frequently reported major. This was quadruple the number of respondents listing history, the next most popular major. Other frequently reported specializations included journalism, public administration and english. One individual reported a Doctoral level degree in library and information science. There were a total of 8 Doctor of Philosophy degree holders. Another four individuals reported holding the JD degree.

Recognizing that professional development takes place in a wide variety of settings, the survey next asked individuals to check aspects of professional training that had been most meaningful to them in their work in the advancement research setting. Individuals were free to check as many categories as applied to their experience. Table 6 reports the categories in order of frequency.

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[84] "APRA 1988 Survey," 4.

TABLE 6
APRA 1997 Survey - Training Preferences

Training Type	# of Responses
Independent reading/study	397
Attending National APRA conferences	393
Programs of Local APRA chapters	261
Personal Mentoring Relationships	258
Higher Education course work	195
Vendor product training workshops	159
Library Skills workshops or seminars	148
Training by other professional organizations	145
In-house organized, formal training	93
Training by consulting firms	89
Other*	76
* PRSPCT-L, an APRA sponsored listserve was the most frequent response with 16 references	

Clearly, APRA national and regional events are serving a real need in the profession. The need for well developed library skills is also recognized. While the detail is not available to fully support this conclusion, the vendor product workshop option certainly has the potential of recording the experiences of those who have received training in major online databases like Dialogue, Lexis/Nexis or ABI/Inform.

The responses group of 58 individuals who have educational backgrounds in library and information science offer validation for the belief that library and information science programs should be viewed as highly relevant to the advancement information resources management

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profession. Within this group higher education received the highest ranking! Table 7 offers a full comparison.

TABLE 7
APRA 1997 Membership Survey Results - MLS Group Training Preferences

Training Type	# of Responses
Higher Education course work	34
Attending National APRA conferences	26
Library Skills workshops or seminars	25
Independent reading/study	25
Personal Mentoring Relationships	18
Programs of Local APRA chapters	17
Vendor product training workshops	11
Other*	9
Training by consulting firms	7
In-house organized, formal training	5
Training by other professional organizations	4
* Again PRSPCT-L was the most mentioned item.	

Although the individuals who have written on the topic of appropriate training for advancement information resources professionals failed to see the connection to library and information science, the group of individuals best qualified to judge have given their graduate training strong endorsement. Clearly this sub-group needs to proselytize among the larger advancement research community. Graduate training in library and information science programs should be recommended to advancement researchers seeking to pursue graduate education. Furthermore, individuals in this group need to make their educational qualifications more widely known so that consulting a librarian is no longer thought of in "we/they" terms.

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While the summarization of a similar section in the 1991 survey was reported in overall percentages and the wording of the categories varied somewhat, the relative ranking of the categories was much the same. "Private reading and study" received the highest response and "seminars from development associations like APRA, CASE and NSFRE" ranked second. These were followed by local APRA chapter events and personal mentors.[85]

Salary and Employment Related Factors

Higher education has lead the way in establishing advancement information resources offices as integral parts of university development operations. Likewise, APRA membership has historically drawn its strength from the education community. The 1988 conference group survey indicated that 82.78% of the respondents were from educational institutions. The 1991 and 1994 figures demonstrate the success of APRA's efforts to broaden its constituency with 67.1% and 66.8% of the responses from those employed in education.[86] The 1998 mini-survey reported 68.79% working at educational institutions. The figures for the 1997 survey show an even stronger concentration at 71.41% but the slight difference is not enough to be truly significant. Table 8 reports the complete range for the 1997 results.

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[85]"APRA 1991 Survey," 4.

[86]"APRA 1991 Survey Results," 1; "APRA 1994 Survey Summary," 1.

TABLE 8
APRA 1997 Membership Survey Results - Employers

Employer	# Responding	Percentage
Educational Institution	532	71.41%
Healthcare Organization	69	9.26%
Social Services Organization	40	5.37%
Cultural Organization	29	3,89%
Other*	26	3.49%
Consulting Firm	22	2.95%
Environmental Organization	10	1.34%
Religious Organization	8	1.07%
Product Vendor	6	.81%
No Answer	3	.40%

* Once again respondents showed great reluctance to generalize categories. Of this group the author would place 9 in the cultural category, 4 in social services and 3 in healthcare. Some of the remaining responses include foundations, professional consortia and self-employment.

While planning conferences and publications, APRA needs to be mindful of the fact at approximately a just quarter of the non-commercial audience is outside education, topics which relate only to non-educational organizations will have a limited audience.

With APRA membership costing $100 per year, and with no provision for part time employment the fact that 664 (89.13%) of those members responding to the survey were full time employees was expected. There is the provision for institutional membership but it is tied to a single staff member and is transferable only when the individual leaves the organization.

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In fact, when the length of the average work week figures in Table 9 are examined, many advancement information resources staff members are working longer than the standard 40 hour week. These figures are almost identical to those reported for the 1991 survey.

TABLE 9
APRA 1997 Membership Survey - Length of Work Week

Number of Hours	Count	Percent
No Answer	68	9.13%
1-10 Hours	1	.13%
11 - 20 Hours	10	1.34%
21-30 Hours	16	2.15%
31-40 Hours	295	39.60%
41-50 Hours	313	42.01%
Over 50 Hours	42	5.64 %

In spite of its claim as an international organization, APRA's members are still largely based in the United States. Of the 745 surveys returned 706 worked in the United States, only 27 surveys were returned by those employed in other countries. Of this group, twenty -two were from Canada and four were from the United Kingdom. There was one survey each from Ireland and France.

Several surveys have reported regional statistics which used the terminology of the geographical divisions found in Table 10. However, the earlier surveys neglected to define the states included in each region. The author has imposed her own definitions.

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TABLE 10
APRA 1997 Membership Survey Results - Regional Distribution

Region	Count	Percent	Description*
New England	60	8.05%	Maine[2], Vermont[3], New Hampshire[2], Rhode Island[5], Connecticut[13], Massachusetts[35]
Mid-Atlantic	187	25.10%	New York[64], Pennsylvania[39], Maryland[14], Delaware[0], Virginia[31], West Virginia[0]
South	113	15.16%	North Carolina[16], South Carolina[6], Georgia[20], Florida[11], Alabama[7], Mississippi[2], Louisiana,[7] Arkansas[1], Texas[23], Tennessee[12], Kentucky[8]
Great Lakes	173	23.22%	Ohio[36], Indiana[33], Illinois[30], Michigan[18], Wisconsin[0], Minnesota[42]
Mid-America	41	5.50%	Oklahoma[4], Missouri[15], Kansas[2], Nebraska[4], Iowa[12], North Dakota[2], South Dakota[0], Montana[2], Wyoming[0]
South West	32	4.29%	New Mexico[3], Arizona[11], Colorado[14], Utah[4]
Far West	80	10.73%	California[75], Nevada[1], Alaska[3], Hawaii[1]
Pacific Northwest	19	2.55%	Washington[11], Oregon[8], Idaho[0]
* State totals are reported following the state in [ ].			

The members of APRA are primarily employees of not-for-profit organizations. Six-hundred ninety-nine or 93.83% of the surveys returned were from the non-profit sector. This factor has a significant impact on both salaries and budget levels.

Over the period of the three comprehensive membership surveys, 1991-1997, overall salary levels have moved upward but by no means dramatically so. The greatest gain has been the fact that the percentage of individuals reporting salaries in the lowest ranges have dropped from 38.65% of those responding to the 1991 survey to 17.48% of those responding to the 1997 survey. However, inflationary pressures were no doubt also in play during this period so this does

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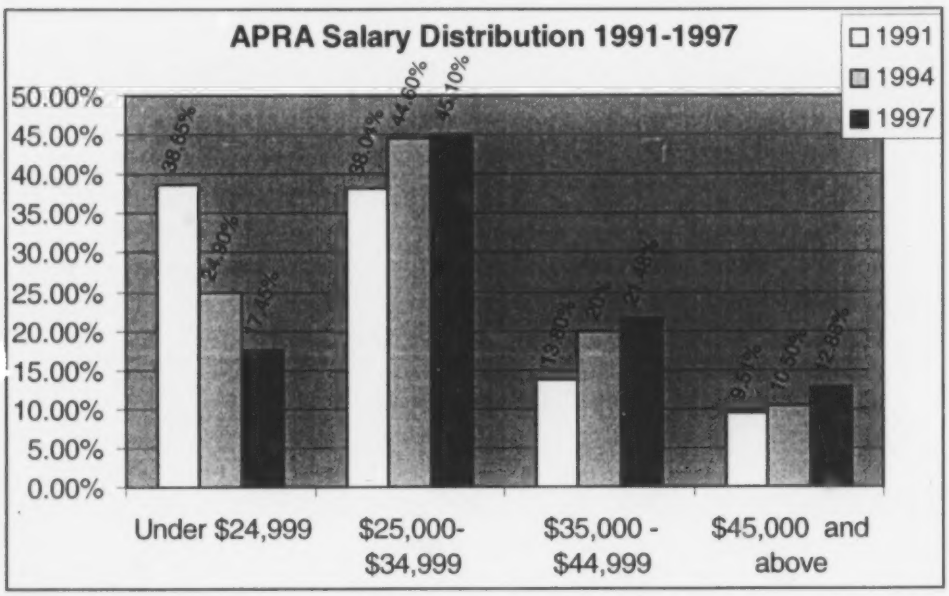
not necessary represent a growth in real earning power. There is still a lamentably small percentage of the pool earning in excess of $45,000. One should keep in mind that overall 50.6% hold undergraduate degrees and an additional 36.24% hold graduate degrees.

TABLE 11
APRA Salary Distribution 1991-1997



There does seem to be a trend of upward movement. The mini-survey which returned a much smaller total pool (266) reported 16.17% earning above $45,000. The $25,000 to $34.999 cohort had dropped to 42.48% and the $35,000 to $44,999 group had risen to 24.43%. The $25,000 level had also dropped (10.15%).

A closer review of the 1997 salary figures in relation to gender is particularly revealing.

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TABLE 12
APRA 1997 Membership Survey - Salary Distribution by Gender

Salary Level	All Respondents		Male Respondents		Female Respondents	
	Count	Percent	Count	Percent	Count	Percent
No Answer	23	3.09%	3	2.47%	13	2.11%
Under $25,000	130	17.45%	11	9.09%	119	19.35%
$25,000 - $34,999	336	45.10%	52	42.98%	283	46.02%
$35,000 - $44,999	160	21.48%	27	22.32%	133	21.63%
$45,000 - $54,999	57	7.65%	12	9.91%	45	7.32%
$55,000 - $64,999	20	2.68%	5	4.13%	14	2.27%
Over $65,000	19	2.55%	11	9.09%	8	1.30%
Total	745	100.00%	121	100.00%	615	100.00%

In a field dominated numerically by women, there is still gross gender inequity in the distribution of salaries and this inequity increases dramatically at the top end of the earning scale. It should be noted that of the 38 individuals reporting earnings in the top two categories, 3 men and 6 women work for the for-profit sector as product vendors or consultants.

Since the style of presentation varies considerably between the salary surveys of various professional organizations, it is impossible to draw exact parallels. However, it would seem that since the salary figures for advancement information resources professionals show 62.55% earning under $35,000 in the 1997 survey, that the field is lagging behind both its counterparts in the library world and also the fund raising arena.

The College and University Personnel Association's 1996-97 survey which was originally published in the *Chronicle of Higher Education* on February 21, 1997 reported the following median salaries for the external fund raising positions with which advancement

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researches work most closely: Director of Annual Giving, $40,646; Director, Planned Giving, $54,907; and Director, Major Gifts, $56,100.[87]

The Association of Research Libraries Annual Salary Survey, 1996-97 showed a median salary of $43,170 for university librarians and a median salary of $49,149 for non-university librarians.[88] This paper has demonstrated that the special librarian as a very similar information profession. However, special librarians are also more highly compensated. The Special Libraries Association 1997 salary survey reported a average salary of $48,601 and a median salary of $45,575 for members in U.S. libraries[89].

The salaries of the APRA members with library and information science degrees were somewhat higher than the over all group. However, 46.53% still reported salaries of $35,000 or less. Clearly, APRA as a professional association could be of enormous service to its membership if it focuses it marketing efforts toward increased professional standing and the remuneration level that should accompany it.

As was noted in the introductory chapter of this work, the field of advancement information resources management or advancement research has yet to develop a standardized terminology. No where is this more obvious than in the area of job titles. More than 250 different titles were

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[87]College and University Personnel Association, "Median Salaries of College Administrators by Type of Institution, 1996-97," <http://chronicle.com/che~data/infobank.dir/factfile.dir/salaries.dir/cupa9697.htm>, (June 15, 1999).

[88]Association of Research Libraries, *ARL Annual Salary Survey* 1996-97, <http://www.arl.org/stats/salary/1996-97/t01.html>, (June 15, 1999).

[89]Special Libraries Association, *1997 SLA Salary Survey*, <http://www.sla.org/research/salsur97.html#table>, (June 15, 1999).

reported by the 745 individuals who returned this survey. The most frequently reported title was "Director of Prospect Research" but only 27 individuals reported that exact title. A total of 53 utilized the phrase "Prospect Research." If the string was limited to just the word, "Prospect," 73 individuals had titles meeting the criteria. "Director of Research" and "Research Analyst" were both used more than two dozen times. The word "information" appeared in only 16 records, while the term "services" appeared in 23. The most popular descriptive term in the reported titles was "research" which appeared in 232 of the titles. Resources management appeared only twice. One individual holds the title of "University Advancement Research Librarian." A total of four records use the term "librarian" within the title, each of these four reported holding an MLS degree. Two did report salaries in the $35,000 - $44,999 range which is above the median for the advancement information resources profession as a whole but still below the median salaries of the various library surveys in spite of the fact that they reported ages of 45 years or more.

In an effort to determine responsibility level, especially as related to a managerial role, respondents were asked to report the current level of their position. While terminology can certainly vary from institution to institution, this question is helpful in providing an idea of the relative rank within the profession. Levels were divided into administrative and support staff. Only 28 support staff individuals returned surveys. Twenty-five of them reported serving at the "research assistant" level while an additional 3 were recorded as "secretaries." No titles of "clerk" were recorded. The author can only hope that this means that the profession has at least put the file clerk designation behind it.

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TABLE 13
APRA 1997 Membership Survey Results - Relative Responsibility Level

Description	Count	Percent
No Answer	36	4.83%
Vice President	7	.94%
Director	233	31.28%
Manager	112	15.03%
Researcher	267	35.84%
Assistant Researcher	15	2.01%
Other Administrative Level	47	6.31%
Research Assistant	25	3.36%
Secretary	3	.40%
Clerk	0	------
Total	745	100.00%

Allowing for variance in terminology it would still appear that 47.25% of this individuals have some level of managerial responsibility if we look at the "Vice President", "Director" and "Manager" cohorts. Several of the positions reported under "Other" also appear to be managerial so this figure could be as high as 50%. Another factor supporting the concept of managerial responsibility is the fact that 340 or 45.64% of the respondents reported that they served as the budget manager for the advancement research area.

In light of Diane Crane's theory regarding job satisfaction for advancement researchers being tied to the department's location on the organizational chart, the reporting structure for the director of research is particularly significant[90]

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[90]Crane, "Organizational Chart," 18-19.

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TABLE 14
APRA 1997 Membership Survey Results - Reporting Structure

Response	Count	Percentage
Vice President, Advancement/External Affairs	161	21.61%
Director of Development	233	31.28%
Director of Administration	15	2.01%
Director of Major Gifts/Capital Support	58	7.79%
Corporate and/or Foundation Director	28	3.76%
Director Advancement Services	62	8.32%
Other	128	17.18%
No Answer	60	8.05%

Once again the high percentage of "Other" seems to point to a reluctance to generalize. For example, 21 respondents checked the "Other" category but listed a title of Vice President albeit not precisely "Advancement/External Affairs."

The section regarding budget levels was extremely disappointing. In the case of the annual budget for the development office, 57.05% of the respondents either recorded "not sure" or did answer the question. With such figures it does not seem wise to use this category for analysis of the state of the profession.

The responses for the breakdown of the research budget into various categories was even more inconclusive. Online services received more response than any other category and yet fewer than one third of the surveys reported a value. The figures were spread from $100.00 to $500,000.00! However, this organization also reported a development budget in excess of $10,000,000 with "300 or more" staff members and "10 or more" full-time equivalent researcher

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positions and an overall institutional budget in access of $500 million. Only 11 surveys indicated annual online services budgets of $50,000 or more.

Operations of this size are clearly exceptional. The figures in Table15 and Table 16 demonstrate that small shops are the norm.

TABLE 15
APRA Membership Survey Results - Development Office Staff Size

Number of Employees	Count	Percentage
No Answer	52	6.98%
Under 5	109	14.63%
5-15	298	40.00%
16-25	87	11.68%
26-35	47	6.31%
36-45	33	4.43%
46-55	18	2.42%
56-100	52	6.98%
101-299	37	4.97%
300 or more	2	.27%
Not Sure	10	1.34%
Total	745	100.00%

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TABLE 16
APRA 1997 Membership Survey Results - Full-time Equivalent Researchers

FTE Equivalent Researchers	*Count*	*Percentage*
No Answer	233	31.28%
None	66	8.86%
Less than one	80	10.74%
One	162	21.74%
2-5	171	22.95%
6-9	27	3.62%
10 or more	6	.81%
Total	745	100.00%

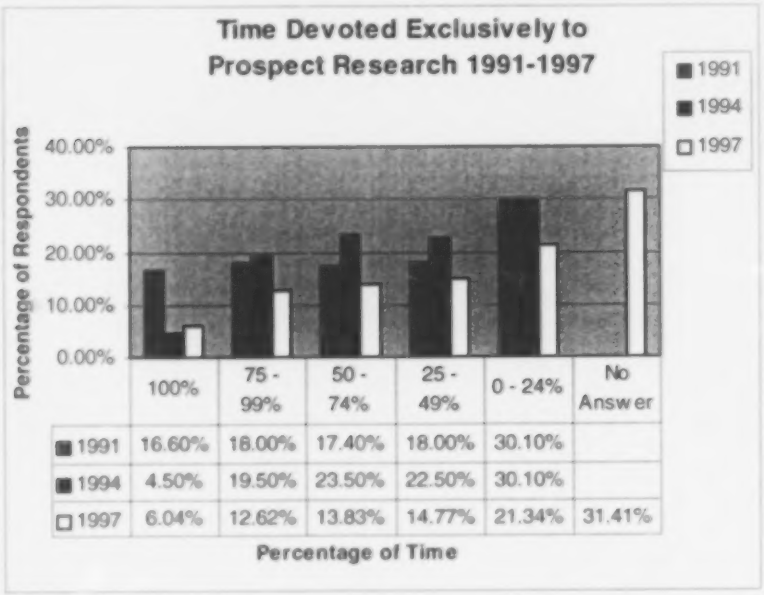
The author is extremely puzzled by the high percentage of non-responders to the full-time equivalency question unless it is tied to the previously noted reluctance to generalize. However, it is still significant to note in Table 16 that for 41.34% of the respondents there is only the equivalent of one full-time position devoted to the prospect research function.

Research Style, Techniques and Policies

Given the fact that many shops, including those with several staff members, report full-time equivalent research positions as "less than one" or "one," the Association has traditionally had an interest in determining which additional functions are included in the job responsibility profile of its membership. As was noted earlier, the perception that prospect research is only one of several functions was in part responsible for the broadening terminology of the 1995 name change. The three comprehensive membership surveys, as reported in Table 17, attest to the fact that the narrow concept of prospect research or the production of individualized profiles is only a small percentage of the work of real world researchers. Furthermore, they demonstrate a strong trend

that shows the profile ("prospect research") component of positions becoming smaller and smaller.

TABLE 17
Time Devoted Exclusively to Prospect Research 1991-1997



	100%	75 - 99%	50 - 74%	25 - 49%	0 - 24%	No Answer
1991	16.60%	18.00%	17.40%	18.00%	30.10%	
1994	4.50%	19.50%	23.50%	22.50%	30.10%	
1997	6.04%	12.62%	13.83%	14.77%	21.34%	31.41%

Once again, the author is puzzled and reluctant to advance a theory as to why 31.41% of the respondents to the 1997 survey chose not to answer this question. However, one possible explanation lies in the fact that the profile production part of the occupation has become so completely integrated with other functions that it is hard for advancement information resources staff members to make an educated estimation and so they choose not to answer rather than to give misleading data.

If the profession no longer spends its time doing traditional "prospect research," what does it do? Table 18 presents a ranked list of responses to the survey which gave the option of request checking as many other function categories as may apply. The 1991 survey results are included

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by way of comparison. The dramatic increase in additional functions in the 1997 survey attests yet again to the need to broaden the descriptive name of the profession.

TABLE 18
APRA Survey Results - Functions of the Advancement Research Office

Function	1997 Survey		1991 Survey
	Count of Responses	Percent of Total Surveys	Percent of Total Surveys
Prospect Research	501	67.25%	N/A
Prospect Management/Tracking	391	52.48%	11.0%
Prospect Screening/Rating	352	47.25%	10.6%
Records Management/Filing	345	46.31%	14.7%
Database Maintenance/Data Entry	273	36.64%	4.1%
Computer Support/Reporting	212	28.46%	6.3%
Donor Management	174	23.36%	N/A
Supervision/Administration	147	19.73%	8.3%
Donor Management Committee	128	17.18%	N/A
Special Events	114	15.30%	5.4%
Donor Stewardship	113	15.16%	6.2%
Campaign Management	105	14.09%	5.8%
Correspondence Production	94	12.62%	N/A
Travel Planning Support	60	8.05%	N/A
Other*	59	7.92%	27.6%
	*When asked to specify, Grant Writing was mentioned by 20% of the respondents to this category. Other multiple responses included front line fund raising and alumni relations work.		* Includes 10.9% solicitation 5.7% planning and 3.2% volunteer coordination

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The 1997 Survey requested exact numbers for both the number of professional staff and the number of support staff members in the advancement services and research areas. In framing this question the committee purposely broadened the terminology to help reinforce the concept that we were seeking data beyond the pure "prospect research" role. The results presented on TABLE 19 show once again that small offices are in the majority . The actual numbers of professional level employees ranged from 1 to a high of 67. The largest number of support staff any at any institution was 47.

TABLE 19

APRA 1997 Membership Survey - Size of Advancement Information Resources Staffs

Size of Staff	Professional Level		Support Level	
	Number of Institutions	Percent of Respondents	Number of Institutions	Percent of Respondents
one	128	17.18%	294	39.46%
2 - 5	239	32.08%	232	31.14%
6 - 10	99	13.29%	55	7.38%
11-20	45	6.04%	33	4.43%
21-30	8	1.07%	5	.67%
More than 30	5	.67%	2	.27%

Discussion regarding ethics, privacy, relevance and the use of the information has formed an important component of the literature of advancement information resources management. It would seem the discussion has been closely followed and agreed with since 64.77% of the respondents reported that their institution either has its own formal ethics statement or that they use the APRA approved statement. Only 66 individuals or 8.6% of the pool indicated that an ethics statement was not needed. The question regarding who has access to confidential

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information returned a 62.55% majority reporting that access was given to all development office staff members.

Advancement information resources staff members are less committed to the idea of a procedures manual for their departments. While 33.69% (251) reported having such a document, 12.21% (91) felt there was no need for one. Another 16.91% (126) pleaded time constraints as the reason such a document did not exist. An addition 7.38% (55) gave a variety of reasons ranging from "apathy" to a number of "in-progress" efforts. The remainder of the pool 29.80% (222) chose not to respond to this question.

In regards to the documentation of central database management systems, the largest number of respondents, 205 (27.52%), reported that an institutional computing center had primary responsibility for that task. However, it was followed closely by 201 (26.98%) who indicated that the task fell to the Advancement Services area. This term corresponds favorably to the authors preferred nomenclature of "advancement information resources" which implies management of all information support functions under the fund raising umbrella. The narrower definition of the advancement research staff itself was the response of 103 (13.83%) of the pool. An additional 138 (18.52%) survey respondents chose not to answer this question. There was little uniformity in the responses of the 98 individuals who checked the "Other" category. Again, the comments demonstrated a reluctance to generalize and a need to be absolutely specific. The remarks to this area included one survey which noted "don't get me started!" Clearly advancement database systems can trigger strong emotion.

The final group of questions in the main survey elicited the members' views regarding APRA itself and sought additional information about members' ties to other organizations.

APRA seems to be doing an excellent job of meeting the expectations of its members with 80.26% giving the organization either a positive or very positive rating. Only 4 respondents (.54%) recorded responses on the negative end of the spectrum. Table 20 reports the ranking responses for the seven member-related services provided by APRA. With 'Professional Development", "Networking", and "Educational Opportunities" strongly reported in the top three ranks, the annual conference will remain APRA's most important service. It is interesting to note that the journal *Connections* with its theoretical and practical papers out polls the *Bulletin* which is devoted to Society and chapter news items.

TABLE 20
APRA 1997 Membership Survey Results - Priority Ranking of APRA Membership Services

	Number of Responses						
Rank	Professional Development	Networking	Educational Opportunities	Professional Recognition	Job Opportunities	Connections	Bulletin
1	313	230	137	47	32	121	71
2	113	89	81	17	16	50	20
3	43	84	71	27	21	70	30
4	20	29	37	37	36	61	41
5	13	21	28	28	24	39	62
6	2	4	17	25	61	29	49
7	1	3	4	69	57	14	23
8	0	0	0	2	1	0	0

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Like most associations APRA is interested in knowing what other professional memberships its members hold. Of the 745 responses 450 listed memberships in other organizations. By far the largest response was involvement in the state or local chapter of APRA. This category combined with the check off for the New England Development Research Association garnered 285 responses. The next most popular membership was that in the Council for the Advancement and Support of Education at 177. This figure was certainly expected in view of the high percentage of APRA members working in the higher education sector. The third tier belongs to the National Society of Fund Raising Executives with 121 responses. This professional association has members from all types of non-profit fund raising. The other responses are much smaller: 15 for the Association for Healthcare Philanthropy seems low but one must keep in mind that only 9.2 6% of APRA members reported working for a healthcare organization.

The remainder of the options were selected to gather data regarding other professional societies serving the information field. However, the overlap seems minimal. The following numbers were recorded: Special Libraries Association, 15; American Record Management Association,5; Association of Independent Information Professionals 3. No one recorded membership in the Society of American Archivists. However, the responses in the "other" category included one member of American Society for Information Science, one member of the Society of Competitive Intelligence Professionals and three members of state library associations.

While it was interesting to note that the Special Libraries Association had as large a representation as any non-fund raising group, there clearly is very little cross-pollination between advancement information resources professionals and their counterparts in other information-oriented careers. The national board of APRA should consider cooperative arrangements with

other professional groups. Especially important would be efforts to increase the sharing of literature and ideas. However, APRA could reach out to these more established groups in other ways.

For example, journalists, fine arts appraisers, stock brokers and even a small number of librarians have been asked to make presentations at national APRA conferences. How ever many other opportunities have been overlooked. When the national conference meet in downtown Pittsburgh in 1997, there was no contact with the University of Pittsburgh's School of Library and Information Science just a few miles away.

The initiative will have to come from within APRA, advancement research or advancement information resources management is a new and largely unknown profession. It has gained great acceptance among other fund raising professionals but it must now work to build strong bridges to the other information specialist professions if it is to truly succeed in fulfilling its mission to "foster professional development and promote standards that enhance the expertise and status of development research and information service professionals worldwide."[91]

Internet Use Survey

Given the dynamic nature of the Internet, a survey done in early 1997 must be viewed as something of a "period piece." The paper will give it only summary attention. However, it would become an extremely interesting study if APRA conducts a second survey of Internet use among its membership. Such an undertaking would allow for trend analysis and help measure changes in usage patterns.

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[91]American Association of Professional Researchers for Advancement, *1999 Resource Manual* (Westmont: IL, Association of Professional Researchers for Advancement, 1999): 4.

Six-hundred-fifty-five individuals indicated that their offices had Internet access in early 1997. In reviewing this data it is critical to keep the time period constantly in mind since the intervening two years have seen explosive growth in Internet use within the profession. Conference topics dealing with the Internet had first been initiated in 1995.[92] These sessions were still presenting Internet topics as the wave of the future not a daily working reality. APRA members were using the tool but were by no means computer "geeks" as demonstrated by the figures on Table 21 relating to hours of use per week. In this case the percentages are based on the number of people who responded to the particular question not the comprehensive survey total response figure of 745.

TABLE 21
APRA 1997 Internet Use Survey - Hours per Week

Hours Used per Week	Personal Use	All Work Related Use	Advancement Research Use
Less than 1	58.66%	13.40%	18.42%
1 - 5	36.28%	44.34%	45.50%
6 - 10	2.71%	24.88%	21.80%
11 - 15	1.08%	9.73%	5.83%
16 - 20	.54%	4.64%	3.76%
More than 20	.72%	3.03%	1.69%

The low personal use figures clearly demonstrates that advancement information professionals viewed the Internet as a work tool not a lifestyle. It is to be hoped that APRA will repeat this survey topic in the near future to ascertain how the intervening years have effected the amount of time spent using this tool.

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[92]APRA, APRA History, Chapter 10.

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Reflected the high percentage of members in the higher education sector the vast majority of users indicated they had direct institutional access. Netscape was the preferred browser with 572 users as opposed to 44 for Microsoft explorer. Mosaic and Lynx were reported by 16 and 30 individuals respectively Of those using other providers, local Internet service providers received 55 responses as did America OnLine. CompuServe was listed by 42 respondents; Prodigy by 8 and NetCom by 4.

Finding directory information for individuals and especially telephone information received the highest ratings. This was followed closely by directory information regarding corporations. Some specialized uses also had gained a large following. For example, 217 individuals reported the Internet as "very useful" in obtaining stock quotations. The power of the Internet for networking and the usefulness of specialized websites was demonstrated by the fact that the highest rating for any category was given to "Using research oriented webpages as a spring board to other useful sites." with 251 individuals giving it the "very useful" rating. This score is also reflective of the state of the search tools for the Internet. Guide sites in which someone else has already located the useful reference make up for inadequacies in Internet search tools.

When asked to check all search engines that they use on a regular basis the following responses were recorded: Yahoo!, 447; Alta Vista, 443; Infoseek, 232; Lycos, 197; Webcrawler, 157; Excite, 156; Magellan, 91; The Electric Library, 38; and IBM Infomarket, 11. HotBot and MetaCrawler were the most popular write-in additions. Each garnered tallies in the mid-twenties.

AltaVista was the most frequently noted "first choice" in search engines with 253 individuals making this choice. Yahoo! was ranked next but it received only 120 votes. The choice of

AltaVista was generally credited to its comprehensiveness and its special search features. None of the other choices were mentioned more than 30 times.

Yahoo! was the most frequently cited "second choice" search engine. Its subject index was noted as the primary reason for use. AltaVista was second in this category with 75 responses. All other engines received less than 40 notations.

Very few of the respondents subscribed to multiple listservs. The overwhelming favorite with 454 subscribers was PRSPCT-L the APRA associated listserv. The next most frequently subscribed site was the general fund raising discussion listserv FUNDLIST but it only recorded 50 subscribers.

Favorite Internet sites listed were in line with what would have been expected given the responses to the types of information and sites advancement information resources staffs found most useful. Edgar was the most frequently reported site. Switchboard, 555-1212, Hoover's and AltaVista rounded out the top five.

Finally, the general comments regarding the use of the Internet for advancement research showed an openness to exploring this new tool blended with a healthy skepticism that it was not a cure-all nor was it yet a replacement for many standard reference works. Several respondents mentioned the fact that Internet research could easily eat up a lot of valuable work time: "Can be abused. A real time gobbler." "Use with caution. Hidden Cost: your time." However, others siting the use of online versions of standard references noted that Internet use was saving them time in fewer trips to the library building. Several noted that sources and search engines were steadily improving and expected its utility to increase. Like information professionals in a variety of careers comments also stressed a concern with the accuracy and authority of the sources

noting that like all other reference sources, Internet information must be verified. Overall, it was clear that advancement information resources professionals were using and evaluating this relatively new information tool. However, most were not so confident as the enthusiastic individual who, obviously in tune with the latest jargon commented: "Catch the wave and go with it and enjoy!" It remains for the results of the next APRA Internet Use survey to determine if indeed the profession as a whole has "gone with it!"

CHAPTER 5

ADVANCEMENT INFORMATION RESOURCES MANAGEMENT FOR THE NEW MILLENNIUM

As the world moves into the 21st century and the Association for Professional Researchers for Advancement moves into its second decade of service to the philanthropy, the examination of the literature of the profession and the evaluation of the data provided by the membership surveys provides a knowledge base upon which to chart the course of the future.

The data as demonstrated that advancement information resources management is a professional field which is receiving increased recognition in the discipline of fund raising but still must work to gain parity with the other branches of the fund raising world and, indeed, with the other information oriented professions. While the "bottom line" may not be everything, in our capitalist economy it is still a strong indicator of the value placed on work. Although fund raising executives are now giving praise and recognition to advancement research, they are not yet remunerating its practitioners on a par with other advancement professionals. True recognition will not come until there is equity in this area as well as acknowledgment of the contributions of advancement information specialists to the successful cultivation and solicitation process.

As a professional organization APRA needs to focus its efforts on reaching a wider segment of the fund raising spectrum. It is still overwhelmingly an association of information specialists

for higher education fund raising. There is certainly room for great growth in the healthcare, arts and social services fields.

APRA can take real pride in its accomplishments over its first decade, it has served its constituencies well through its conferences, and Internet presence. It is beginning to develop its own professional literature, both of practice and of theory. In time a focus on professional discourse could overshadow the interpersonal networking and professional development services of the conference arena.

As individuals, advancement information resources professionals have demonstrated a thoughtful approach to information provision. The literature clearly shows the growth of a group of skilled and dedicated individuals committed to the support of the institutions they serve. They need to recognize, however, that while they may be the lone information oriented career path in the field of philanthropy, there are many other more established information disciplines and careers.

The practitioners and literature of these information-related fields can be of tremendous help in addressing challenges in professional status and even more importantly in assessing the nature of the information provision processes. In this regard, the advancement research specialists who hold advanced degrees in library and information science need to take the lead in introducing advancement research to the broader world of information science.

As the profession continues to mature, it will be the people and not the technologies which drive the progress. At the time APRA was forming as a professional association in the mid-1980s, Robert Taylor had conceptualized this basic truth:

> Technology can provide the means for manipulating the data, can compare the data, and tell you which is higher or lower and can inform you of the statistical significance level. But it cannot put the information together in meaningful ways in response to the needs of a person or group of persons.[93]

Special librarians have long recognized the critical importance of the analytical component of their services. The following text written nearly two decades ago about corporate libraries and the move from more traditional collection based services to information resources management can be modified to stand as a lodestar for advancement information resources offices:

> Clearly the challenge for today's [advancement researcher] is to become tomorrow's information resources manager, integrate the information center into overall corporate information services and operations, and assume leadership for the application of new information technologies to accomplish organizational goals and objectives.[94]

A profession dedicated to the discipline of philanthropy and the financial support of the non-profit sector can not help but resonate to the words of Jon Thorsen, former APRA president.

> Behind all these changes is a single primary goal: finding some way of dealing with all this information that flies toward (and, sometimes, away from) us through an increasing number of sources. Researchers, poised on the front lines of the information revolution, are uniquely qualified to serve as the information managers of the development profession. When done correctly, our jobs have always been about locating, assessing, interpreting, disseminating and directing information.[95]

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[93]Robert S. Taylor, Value-Added Processes in Information Systems (Norwood, NJ: ABLEX Publishing Corporation, 1986), 128.

[94]Charles R. McClure and Linda L. Hill, "Special Considerations for Corporate Library Planning: Moving Toward Information Resources Management," Journal of Library Administration 2 (Summer, 1982): 127.

[95]Jon Thorsen, "Information: the Oddest of Commodities," [http://www.taftgroup.com/taft/utsaug98.html], July 2, 1999.

The half century following Bush's landmark article has indeed witnessed the creation of professions of trail blazers through the mushrooming maze of information. Advancement researchers must function as advancement information resources managers if they are to provide the knowledge base upon which their institutions can thrive in the new century.

APPENDIX A

Association of Professional Researchers for Advancement

Basic Skills Set

ASSOCIATION OF PROFESSIONAL RESEARCHERS FOR ADVANCEMENT

BASIC SKILLS SET

DEFINITION OF TERMS

Proficiency: Experienced at accomplishing the activity.

Knowledge: Detailed grasp of details, specifics and shades of meaning; practice has been intense and/or frequent; could instruct others.

Understanding: Comprehend the philosophy supporting the issue, policy or procedure.

Awareness: Recognition of terms and broad understanding of meaning; actual practice may be minimal and infrequent; could not instruct others

SKILLS

General fund raising

- Knowledge of donor types: individual, corporate, foundation and government.
- Understanding of cultivation process/cycle: identification, qualification, cultivation, solicitation, stewardship.
- Awareness of the definition of philanthropy and the motivations behind charitable giving.
- Awareness of the different units within overall fund-raising programs and how the various jobs and responsibilities among these programs require different support and services from prospect researchers. These programs include annual giving, campaigns (capital, endowment and comprehensive), major gift fund-raising, planned giving, grantwriting, gift records and stewardship.

General prospect research

- Proficiency in recognizing wealth indicators.
- Proficiency in identifying prospects.
- Knowledge of ethics statements by APRA, CASE and other appropriate associations.
- Understanding of a donor's rights.
- Understanding of the role information plays in prospect development throughout the prospect cultivation cycle.
- Understanding of what constitutes relevant and strategic information and how to analyze the data to support prospect development.
- Understanding of the distinction between public and private information.
- Recognition of the difference between proactive research (taking the initiative in identifying and qualifying prospects) and reactive research (responding to directives or requests for research).

Institutional knowledge

- Knowledge of your organization's mission, history, programs, goals and philosophy.
- Knowledge of your organization's funding needs and goals.
- Knowledge of your organization's culture and the staff's work style.

BASIC SKILLS SET *Continued*

Resources

- Proficiency in locating relevant information in a variety of formats: including hard copy, telephone calls, online and conversations with staff and volunteers.
- Proficiency in locating additional resources by asking questions of librarians, government employees and colleagues.
- Proficiency in acquiring appropriate, sound information that is affordable for a non-profit fund-raising operation.
- Knowledge of primary resource providers (online and hard copy; government and commercial; internal and external).
- Understanding of electronic resources and their uses, including CD-ROMs, online services and the Internet.

Online searching

- Understanding of information management in a database structure, particularly the ability to manipulate and retrieve data.
- Awareness of the type and scope of data available on-line.
- Awareness of search techniques.

Reporting

- Proficiency in writing clearly and concisely.
- Proficiency in synthesizing material from multiple sources into a coherent and accurate presentation.
- Proficiency in appropriate management of confidential information.

Systems

- Knowledge of word processing software.
- Knowledge of organization's record-keeping systems and information retrieval capabilities and protocols so as to be able to use in conducting research.

Organization

- Proficiency in basic file maintenance principles.
- Proficiency in responding to requests and obtaining information in a timely manner.

Interpersonal and Workplace Skills

- Proficiency in communicating effectively with diverse audiences in conversations and through documents.
- Proficiency in conducting an informational interview with people who request information and with those from whom information is sought.
- Proficiency in listening skills.
- Proficiency in independent work.
- Proficiency in working jointly with colleagues in a team effort to reach organization goals.

Professional Development

- Knowledge of available training and educational opportunities to develop skills and to keep abreast of trends within the profession.
- Recognition of advancement officer positions and their roles within advancement.
- Recognition of assessment tools and evaluation procedures for monitoring your own performance against organization goals.

APPENDIX B

Association of Professional Researchers for Advancement

Advanced Skills Set

ASSOCIATION OF PROFESSIONAL RESEARCHERS FOR ADVANCEMENT

ADVANCED SKILLS SET

DEFINITION OF TERMS

Proficiency: Experienced at accomplishing the activity.

Knowledge: Detailed grasp of details, specifics and shades of meaning; practice has been intense and/or frequent; could instruct others.

SKILLS

General fund raising

- Proficiency at supporting and participating in prospect management.
- Knowledge of gift vehicles: cash, securities, real estate, in-kind, personal property.
- Knowledge of types of planned giving vehicles, such as trusts, bequests, pooled income funds.
- Knowledge of appropriate fund-raising strategies for different organization types.
- Knowledge of volunteer roles, identification, training, recognition and support.

General prospect research

- Proficiency in conceptualizing and developing proactive prospecting methodologies to support organization goals.
- Proficiency at identifying prospects through constituent list segmentation, electronic database screening, and peer/constituency screening and rating.
- Proficiency at understanding wealth indicators, including income (estimated or public), assets such as property and inside stockholder data, luxury items, valuable collections, philanthropic activity, and private foundations.
- Knowledge of ethics statements by APRA, CASE and other appropriate associations.

Institutional knowledge

- Proficiency with the history of your organization's field (arts, education, health, social services, etc.).
- Knowledge of current trends within philanthropy and your organization's industry.

Resources

- Proficiency with business terms, documents and practices.
- Proficiency with government documents such as IRS Form 990, deeds and property tax assessments.
- Proficiency with legal documents such as wills and charitable trusts.
- Proficiency at formulating an online search strategy and either executing it directly or requesting the search through a trained librarian or other searcher.
- Knowledge of electronic sources available through the Internet.

Reporting

- Proficiency at developing reports that support planning and decision-making.
- Proficiency at formatting data so that it is easy to read and understand.
- Knowledge of commonly used reporting formats for communicating information relevant to a request.

ADVANCED SKILLS SET *continued*

Systems

- Proficiency in maintaining a prospect tracking system (electronic or paper).
- Proficiency with organization's record-keeping systems and information retrieval capabilities and protocols.
- Knowledge of relational databases and spreadsheet software.
- Knowledge of types of data necessary to support constituent relations.

Organization

- Proficiency at prioritizing and managing multiple, diverse, on-going projects.
- Proficiency at planning and setting meaningful objectives, integrating the work of prospect research into overall advancement office goals.
- Knowledge of basic budget procedures.

Interpersonal and Workplace Skills

- Proficiency in making oral presentations in diverse settings.
- Proficiency in promoting or advocating prospect research.
- Proficiency in organization's job and performance evaluation process.
- Knowledge of principles of management, leadership, conflict resolution, negotiation and motivation.

Professional Development

- Proficiency in staying abreast of trends in the field.

APPENDIX C

American Prospect Research Association

APRA Statement of Ethics

Spring 1992

MISSION STATEMENT

APRA Mission Statement

The American Prospect Research Association is a private non-profit organization created to:

- **encourage professional development among members;**
- **promote prospect research within non-profit organizations;**
- **act as a central source of professional information;**
- **advance cooperative relationships; and**
- **increase philanthropic resources of institutions served by members.**

APRA Statement of Ethics

As representatives of the profession, American Prospect Research Association (APRA) members shall be respectful of all people and organizations. They shall support and further the individual's fundamental right to privacy. APRA Members are committed to the ethical collection and use of information in the pursuit of legitimate institutional goals.

Code of Ethics

In their work, prospect researchers must balance the needs of their institutions/organizations to collect and record information with the prospects' right to privacy. This balance is not always easy to maintain. However, the following ethical principles apply:

I. **Fundamental Principles**

A. Relevance

Prospect Researchers shall seek and record only information that is relevant to the fund-raising effort of the institutions that employ them.

B. Honesty

Prospect researchers shall be truthful with regard to their identity, purpose and the identity of their institution during the course of their work.

C. Confidentiality

Confidential information pertaining to donors or prospective donors shall be scrupulously protected so that the relationship of trust between donor and donee and the integrity of the prospect research profession is upheld.

D. Accuracy

Prospect researchers shall record all data accurately. Such information must be verifiable or attributable to its source.

II. **Procedures**

A. Collection

1. The collection and use of information shall be done lawfully.
2. Information sought and recorded may include all public records.
3. Wrtitten requests for public information shall be made on institutional stationery clearly identifying the sender.
4. Whenever possible, payments for public records shall be made through the institution.
5. When requesting information in person or by telephone, neither individual nor institutional identity shall be concealed.

B. Recording

1. Researchers shall state information in an objective and factual manner.
2. Documents pertaining to donors or prospective donors shall be irreversibly disposed of when no longer needed (e.g. by shredding).

C. Use

1. Non-public information is the property of the institution for which it was collected and shall not be given to persons other than those who are involved with the cultivation or solicitation effort or those who need that information in the performance of their duties for that institution.
2. Only public or published information may be shared with colleagues at other institutions as a professional courtesy.
3. Prospect information is the property of the institution for which it was gathered and shalll not be taken to another institution.
4. Prospect information shall be stored securely to prevent access by unauthorized persons.
5. Research documents containing donor or prospective donor information that are to be used outside Research offices shall be clearly marked "confidential".
6. Special protection shall be afforded all giving records pertaining to anonymous donors.

Recommendations

1. Prospect researchers shall urge their institutions to develop written policies based upon the laws of their states defining what information shall be gathered and under what conditions it may be released and to whom.
2. Prospect researchers shall urge the development of written policies at their institutions defining who may authorize access to prospect files and under what conditions.
3. Prospect researchers shall urge their colleagues to abide by these principles of conduct.

APPENDIX D

Association of Professional Researches for Advancement

APRA Statement of Ethics

October 1998

APRA Statement of Ethics

As approved by the APRA Board of Directors

October 16, 1998

Association of Professional Researchers for Advancement (APRA) members shall support and further the individual's fundamental right to privacy and protect the confidential information of their institutions. APRA members are committed to the ethical collection and use of information. Members shall follow all applicable federal, state, and local laws, as well as institutional policies, governing the collection, use, maintenance, and dissemination of information in the pursuit of the missions of their institutions. APRA members shall respect all people and organizations.

Code of Ethics

Prospect researchers must balance the needs of their institutions to collect, analyze, record, maintain, use, and disseminate information with an individual's right to privacy. This balance is not always easy to maintain. The following ethical principles apply, and practice is built on these principles:

I. **Fundamental Principles**

A. Confidentiality

Confidential information about constituents (donors and non-donors), as well as confidential information of the institutions in oral form or on electronic, magnetic, or print media are protected so that the relationship of trust between the constituent and the institution is upheld.

B. Accuracy

Prospect researchers shall record all data accurately. Such information shall include attribution. Analysis and products of data analysis should be without personal prejudices or biases.

C. Relevance

Prospect researchers shall seek and record only information that is relevant and appropriate to the fund-raising effort of the institutions that employ them.

D. Accountability

Prospect researchers shall accept responsibility for their actions and shall be accountable to the profession of development, to their respective institutions, and to the constituents who place their trust in prospect researchers and their institutions.

E. Honesty

Prospect researchers shall be truthful with regard to their identity and purpose and the identity of their institution during the course of their work.

II. Suggested Practice

A. Collection

1. The collection of information shall be done lawfully, respecting applicable laws and institutional policies.
2. Information sought and recorded includes all data that can be verified and attributed, as well as constituent information that is self-reported (via correspondence, surveys, questionnaires, etc.).
3. When requesting information in person or by telephone, it is recommended in most cases that neither individual nor institutional identity shall be concealed. Written requests for public information shall be made on institutional stationary clearly identifying the inquirer.
4. Whenever possible, payments for public records shall be made through the institution.
5. Prospect researchers shall apply the same standards for electronic information that they currently use in evaluating and verifying print media. The researcher shall ascertain whether or not the information comes from a reliable source and that the information collected meets the standards set forth in the APRA Statement of Ethics.

B. Recording and Maintenance

1. Researchers shall state information in an objective and factual manner; note attribution and date of collection; and clearly identify analysis.
2. Constituent information on paper, electronic, magnetic or other media shall be stored securely to prevent access by unauthorized persons.
3. Special protection shall be afforded all giving records pertaining to anonymous donors.
4. Electronic or paper documents pertaining to constituents shall be irreversibly disposed of when no longer needed (by following institutional standards for document disposal).

C. Use and Distribution

1. Researchers shall adhere to all applicable laws, as well as to institutional policies, regarding the use and distribution of confidential constituent information.
2. Constituent information is the property of the institution for which it was collected and shall not be given to persons other than those who are involved with the cultivation or solicitation effort or those who need that information in the performance of their duties for that institution.
3. Constituent information for one institution shall not be taken to another institution.
4. Research documents containing constituent information that is to be used outside research offices shall be clearly marked "confidential."
5. Vendors, consultants, and other external entities shall understand and agree to comply with the institution's confidentiality policies before gaining access to institutional data.
6. Only publicly available information shall be shared with colleagues at other institutions as a professional courtesy.

III. Recommendations

A. Prospect researchers shall urge their institutions to develop written policies based upon applicable laws and these policies should define what information shall be gathered, recorded and maintained, and to whom and under what conditions the information can be released.

B. Prospect researchers shall urge the development of written policies at their institutions defining who may authorize access to prospect files and under what conditions. These policies should follow the guidelines outlined in the CASE Donor Bill of Rights, the NSFRE Code of Ethical Principles, and the Association for Healthcare Philanthropy Statement of Professional Standards and Conduct.

C. Prospect researchers shall strongly urge their development colleagues to abide by this Code of Ethics and Fundamental Principles.

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APPENDIX E

American Prospect Research Association

1994 Membership Survey

American Prospect Research Association

414 Plaza Drive
Suite 209
Westmont, IL
60559
708-655-0177
Fax 708-655-0391

September 1994

Dear APRA Members:

On behalf of the APRA Board of Directors, I am pleased to enclose the 1994 APRA Membership Survey. In our continuing effort to provide useful services to our members and to keep abreast of the development research field, your answers to these questions are very important.

The survey covers several areas: demographics, salary and tenure, office organization, the research process, and APRA services. Please answer the questions as completely as possible; your response is confidential and the data will be reported in the aggregate.

Considerable effort went into the development of the survey. Special thanks go to the APRA survey task force: Jenni Vande Hey, Julie Thompson, Paulette Persinger, Roslyn Lang, Shelley Brown, Barbara Fleming, and Karen Lynch-Schirra. They contributed their expertise to produce a first draft and tested it at the 1993 National Conference.

This survey would not be in your hands right now without the sponsorship of The Taft Group and the support of Sarah Heck and Bob Elster. They provided consulting, production, and mailing services (not to mention encouragement through the entire process) in order to make this project a reality.

Please take a few minutes now to complete the survey and return it in the enclosed envelope by October 30, 1994. Your response is vital in providing a full profile of who we are as professionals and as a profession.

Sincerely,

Margo Knight

Margo H. Knight
APRA Membership Services Chair

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DEMOGRAPHICS

1. **Gender** Female _____ Male _____

2. **Age. Please check one.**

Under 25	_____	45 - 54	_____
25 - 34	_____	55 - 64	_____
35 - 44	_____	65 or more	_____

3. **Please select the category which best describes whom you work for: (Please check only one.)**

Educational Institution	_____	Social Service Organization	_____
Environmental Organization	_____	Cultural Organization	_____
Religious Organization	_____	Hospital/Medical Center	_____
Consulting Firm	_____	Product Vendor	_____

Other _____

4. **Please select the employment category that best describes what you see yourself doing in five years. (Please check only one.)**

Consulting	_____	Other nonprofit administration	_____
Self-employed	_____	Prospect Research	_____
Fundraising volunteer	_____	Librarian	_____
Fund Raiser	_____	Advancement Services	_____
Not employed	_____	Retirement	_____

Other _____

5. **In which state do you work?** _____

SALARY AND TENURE QUESTIONS

1. **How long have you been in the prospect research field?**

under 2 years	_____	2 years - under 5 years	_____
5 years - under 10 years	_____	10 years or over	_____

2. **Please identify the most accurate description of how you became employed in your current position.**

I responded to an ad for the position	_____
An associate in the field told me of the opening	_____
I was promoted from within my organization	_____
I was asked by my supervisor to join the organization	_____
I was asked by an employee to apply for the position	_____
I was identified through a search process	_____
Informational interview	_____

Other _____

3. What is your current position level?

Director	____	Researcher	____
Secretary	____	Clerk	____
Manager	____	Vice President	____
Assistant Vice President	____	Other	_____

4. Are you the budget manager for the prospect research office?

Yes_____ No _____

5. To whom does the director of research (or similar position) report?

Corporate and/or Foundation Director	____
Director of Administration	____
Director of Development	____
Director of Development/Advancement/Support Services	____
Director of Major Gifts or Capital Support	____
President	____
Vice President for Development/Advancement/External Affairs	____
Other	_____

6. What is your current gross annual salary level?

Under $24,999	____	$25,000 - $34,999	____
$35,000 - $44,999	____	$45,000 or above	____

7. What is the typical tenure of a researcher in your office?

Less than a year	____	4 years	____
1 year	____	5 years	____
2 years	____	Over 5 years	____
3 years	____		

EDUCATION AND TRAINING QUESTIONS

1. What is your highest educational background?

Graduated high school	____	Attended college	____
Associate's Degree	____	Bachelor's Degree	____
Attended Graduate School	____	Master's Degree	____
Earned Doctorate	____		
Other	_____		

2

DEMOGRAPHICS

2. **What specific training have you had in prospect research? (Please check all that apply.)**

Higher education course work	____
In-house formal training	____
Personal mentoring relationship	____
Private reading/study (self-taught)	____
Attending national APRA conferences/seminars	____
Programs through local APRA chapters	____
Training through other professional associations/consulting firms	____
Other	_____

SIZE OF OFFICE QUESTIONS

1. **Are you employed full-time in the research office?**

Yes____ No ____

2. **Including yourself, how many full-time equivalent researchers are in the research office?**

None	____	4 - 5	____
1	____	6 - 9	____
2	____	10 or more	____
3	____		

3. **Do you work for a non-profit organization?**

____ Yes. Go to questions 4 - 8 and skip question 9.
____ No. Skip questions 4-8 and go to question 9.

FOR NON-PROFIT ORGANIZATIONS

4. **What is the annual budget of your research office, including salaries?**

Under $10,000	____	$10,000 - $24,999	____
$25,000 - $49,999	____	$50,000 - $99,999	____
$100,000 - $499,999	____	$500,000 or above	____
No budget for research	____	Not sure	____

5. **Please indicate what percentages of this annual budget are reserved for print, electronic, and on-line resources.**

Print	_____
Electronic	_____
On-line	_____
Other, please specify	_____

6. What is the annual budget of your development office, including salaries?

Under $50,000	____	$50,000 - $99,999	____
$100,000 - $999,999	____	$1 million - $4,999,999	____
$5 million - under $10 million	____	Not sure	____
$10 million or over	____		

7. How many full-time employees are employed by your development office?

Under 5	____	46 - 55	____
5 - 15	____	56 - 100	____
16 - 25	____	101 - 300	____
26 - 35	____	Above 300	____
36 - 45	____	Not sure	____

8. What is the size of your organization's annual budget, including salaries?

Under $500,000	____	$500,000 - $999,999	____
$1 million - under $5 million	____	$5 million - under $10 million	____
$10 million - under $20 million	____	$20 million - under $30 million	____
$30 million - under $40 million	____	$40 million - under $50 million	____
$50 million - under $100 million	____	$100 million - under $500 million	____
$500 million or above	____	Not sure	____

FOR FOR-PROFIT ORGANIZATIONS

9. If for-profit, what is your company's annual sales revenue?

Under $100,000	____	$20 million - under $50 million	____
$100,000 - $499,999	____	$50 million - under $100 million	____
$500,000 - $999,999	____	$100 million - under $500 million	____
$1 million - under $5 million	____	$500 million or above	____
$5 million - under $10 million	____	Not sure	____
$10 million - under $20 million	____		

OPERATIONS

1. **Do you have a training/procedures manual for the research office?**

   Yes _____ No _____ Not sure_____

2. **Does your research office conduct international research?**

   Yes _____ No _____

3. **Are researchers classified as professional or clerical staff at your organization?**

   Professional _____ Clerical _____ Both _____

4. **Does your office have a written ethics statement?**

   Yes _____ No _____

RESEARCH PROCESS QUESTIONS

1. **How much of your time do you devote to prospect research?**

0 - 24 %	_____	75 - 99 %	_____
25 - 49 %	_____	100 %	_____
50 - 74 %	_____		

2. **What other major responsibilities do you have in addition to prospect research? (Please indicate all that apply.)**

Ad hoc committees	_____	Program support	_____
Annual fund	_____	Prospect screening	_____
Capital campaign	_____	Prospect management/tracking	_____
Computer services support	_____	Reading materials/information_	_____
Donor relations	_____	Records management	_____
Gift processing/reporting	_____	Solicitation	_____
Planned giving	_____	Special events	_____
Planning	_____	Supervising/Administration	_____
Volunteer coordination	_____	Proposal writing	_____

Other _____

3. **What, in your opinion, are the 5 most important pieces of information research provides for individual prospect research. (Please rank with 1 being the most important.)**

Biographical information	____	Anecdotes/comments	____
Corporate boards	____	Net worth estimates	____
Divorce information	____	Non-profit boards	____
Employment information	____	Past contact with organization	____
Financial aid/admissisions info	____	Probate information	____
Foundation boards	____	Real estate holdings	____
Giving to your organization	____	Salary and other compensation	____
Giving to other organizations	____	Spouse/children information	____
Hobbies/avocations/interests	____	Student activities	____
Medical information/problems	____	Volunteer activities	____

Other (please specify) _____

4. **Which pieces of information are available in existing resources?**

Biographical information	____	Anecdotes/comments	____
Corporate boards	____	Net worth estimates	____
Divorce information	____	Non-profit boards	____
Employment information	____	Past contact with organization	____
Financial aid/admissisions info	____	Probate information	____
Foundation boards	____	Real estate holdings	____
Giving to your organization	____	Salary and other compensation	____
Giving to other organizations	____	Spouse/children information	____
Hobbies/avocations/interests	____	Student activities	____
Medical information/problems	____	Volunteer activities	____

Other (please specify) _____

5. **Which pieces of information that you noted as available are accessible to you?**

Biographical information	____	Anecdotes/comments	____
Corporate boards	____	Net worth estimates	____
Divorce information	____	Non-profit boards	____
Employment information	____	Past contact with organization	____
Financial aid/admissisions info	____	Probate information	____
Foundation boards	____	Real estate holdings	____
Giving to your organization	____	Salary and other compensation	____
Giving to other organizations	____	Spouse/children information	____
Hobbies/avocations/interests	____	Student activities	____
Medical information/problems	____	Volunteer activities	____

Other (please specify) _____

6. What other types of information are important, but are unavailble in existing resources? Please specify.

Biographical information	____	Anecdotes/comments	____
Corporate boards	____	Net worth estimates	____
Divorce information	____	Non-profit boards	____
Employment information	____	Past contact with organization	____
Financial aid/admissisions info	____	Probate information	____
Foundation boards	____	Real estate holdings	____
Giving to your organization	____	Salary and other compensation	____
Giving to other organizations	____	Spouse/children information	____
Hobbies/avocations/interests	____	Student activities	____
Medical information/problems	____	Volunteer activities	____

Other (please specify) _____

7. Identify all sources utilized for prospect identification.

Census information	____	Local periodical scanning	____
Clipping services	____	National periodical scanning	____
Demographic screening	____	Print references on companies	____
Donor lists	____	Print references on individuals	____
Electronic sources on companies	____	Print references on foundations	____
Electronic sources on individuals	____	Other print references	____
Electronic sources on foundations	____	Screening by constituents	____
Other electronic sources	____	Stockholding tracking	____
Internal review of top lists	____	Surveys/Questionnaires	____
Special events	____	Volunteer committee	____
Zip code tracking	____		

Other (please specify) _____

8. Who has access to confidential information?

All development office staff members	____
Anyone with access to files, including students	____
Highly confidential information is withheld from the files altogether	____
Judged on a case-by-case basis	____
Key volunteers, including trustees	____
Organization's senior officers, including President and Chancellor	____
Research office & the development officer responsible for the prospect	____
Research staff only	____

Other _____

INFORMATION MANAGEMENT/EQUIPMENT SUPPORT QUESTIONS

1. **Please indicate the reference source formats you use on a regular basis.**

CD-ROMs	____	Newspapers	____
Print sources	____	On-line databases	____
In-house file information	____	Word of mouth	____
Journals/magazines	____	Diskette products	____

Other _____

2. **Please indicate all of the types of software products used in your office.**

CD-ROMs	____	Electronic databases	____
Database programs	____	Spreadsheet programs	____
Desktop publishing programs	____	Word processing programs	____
Diskette products	____		

Other _____

3. **Please indicate all of the types of software products used at the library or another off-site location.**

CD-ROMs	____	Electronic databases	____
Database programs	____	Spreadsheet programs	____
Desktop publishing programs	____	Word processing programs	____
Diskette products	____		

Other _____

4. **Please indicate all on-line, electronic database systems or CD-ROMs used in your office.**

Compact Disclosure	____	Information America	____
Damar	____	Internet	____
DataTimes	____	Investnet	____
Dialog	____	NEXIS	____
Dow Jones	____	REDI	____
Dun and Bradstreet	____	VU/Text	____
News/Net	____	CompuServe	____
Prodigy	____	POW&Rline	____

Other _____

OPERATIONS

5. Please indicate all on-line, electronic database systems or CD-ROMS used at the library or another off-site location.

Compact Disclosure	____	Information America	____
Damar	____	Internet	____
DataTimes	____	Investnet	____
Dialog	____	NEXIS	____
Dow Jones	____	REDI	____
Dun and Bradstreet	____	VU/Text	____
News/Net	____	CompuServe	____
Prodigy	____	POW&Rline	____

Other _____

6. What formats are preferred in your office?

Compact Disclosure	____	Information America	____
Damar	____	Internet	____
DataTimes	____	Investnet	____
Dialog	____	NEXIS	____
Dow Jones	____	REDI	____
Dun and Bradstreet	____	VU/Text	____
News/Net	____	CompuServe	____
Prodigy	____	POW&Rline	____

Other _____

1. **What was your primary reason for joining APRA? (Please choose only one reason.)**

It was expected of me	____	Professional networking	____
Keep current on trends	____	Travel opportunities	____
Learn about techniques	____		

Other _____

2. **How long have you been an APRA member?**

Under 1 year	____	4 - 5 years	____
1 year	____	Over 5 years	____
2 - 3 years	____		

3. **Is your APRA membership paid for by your institution?**

Yes ____ No ____

4. **Besides APRA, do you belong to other professional organizations?**

Yes ____ No ____

5. **Do you expect to attend a professional conference in the next 12 months?**

Yes ____ No ____

6. **In which subject areas do you feel you need enhanced or additional training?**

Networking connections	____	Prospect tracking	____
Appreciated assets research	____	Major gift research	____
Research on individuals	____	Planned giving research	____
Probate information	____	Computer equipment/software	____
Corporate foundations	____	Project-based research	____
Real estate holdings	____	Career development	____
Private foundations	____	Income research	____
Stock information	____	Corporate direct giving programs	____
Laws and legal implications	____		
List management/reports	____	Prospect screening	____

Other _____

7. **My general attitude toward APRA is: (Please check only one.)**

Very positive	____	Positive	____	Neutral	____
Negative	____	Very Negative	____		

10

APRA SERVICES

8. What is APRA's greatest service to you? (Please rank, with 1 being most important.)

Networking	____	Educational opportunities	____
Professional development	____	*Connections*	____
Bulletin	____	Job opportunities	____
Professional recognition	____		

Other _____

9. What areas could APRA improve or strengthen?

Networking	____	Educational opportunities	____
Professional development	____	*Connections*	____
Bulletin	____	Job opportunities	____
Professional recognition	____		

Other _____

10. How satisfied are you with the APRA board and committees and how they represent you as a member?

Very satisfied	____	Somewhat satisfied	____
Satisfied	____	Somewhat unsatisfied	____
Very unsatisfied	____		

11. How satisfied are you with the communications you receive from APRA?

Very Satisfied	____	Somewhat satisfied	____
Satisfied	____	Somewhat unsatisfied	____
Very unsatisfied	____		

12. What do you like and dislike about Connections and/or Bulletin, the newsletter for APRA?

	Like	Dislike
Frequency	____	____
Articles	____	____
Advertisements	____	____
Bibliographies	____	____
Book Reviews	____	____

Other _____

13. Is there a local APRA chapter in your region?

Yes ____ No ____ Don't know ____

14. If "No," would you be willing to help organize one?

Yes ____ No ____

15. Do you feel you are getting your "money's worth" from the membership fee?

Yes _____ No _____

16. What do you feel are your responsibilities to a professional organization?
What activities/responsibilities are you willing to volunteer for?

_____

_____

_____

_____

17. What suggestions do you have to help APRA meet your needs?

_____

_____

_____

_____

Thank /You ! !

APPENDIX F

Association of Professional Researches for Advancement

1997 Membership Survey

ASSOCIATION OF PROFESSIONAL RESEARCHERS FOR ADVANCEMENT

414 Plaza Drive
Suite 209
Westmont, IL
60559-1265
630-655-0177
Fax 630-655-0391
E Mail
apra@admin-sys.com

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December 20, 1996

Dear APRA Member:

On behalf of the APRA Board of Directors, I am pleased to send to you the 1997 APRA Membership Survey. In our continued effort to provide useful services and to keep abreast of the development research field, I ask for 100% participation from you, the members. Your answers to these questions are very important.

The survey covers several areas including demographics, salary and tenure, office organization, and the research process. There is also a "special focus" survey on Internet use. Please answer all questions as completely as possible. Your response is confidential and the data will be reported in the aggregate.

Considerable effort went into the development of this survey and I wish to acknowledge and thank Anne Mayer and Michel Hudson for their fine contribution and effort in preparing this document.

Also included in this mailing is a Membership Update Form. Please take a few moments to looks over your current information, and update it where necessary. This information will be used to compile the 1997 APRA Resource Manual.

Please return these forms to the APRA Office in the enclosed envelope by January 10, 1997. Your response is vital in providing a full profile of who we are as professionals and as a profession, and in providing focus on services that we provide as an association.

Sincerely.

Napoleon L. Hendrix, III
APRA Membership Services Director

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Membership Survey

Demographics:

Gender: Female _____ Male_____

Age: Please check one.

Under 25 _____ 25 - 34 _____ 35 - 44 _____
45 - 54 _____ 55 - 64 _____ 65 or more _____

Ethnic Background:

Caucasian _____ African _____
Hispanic _____ Asian _____
Native American _____ Other: _____

Tenure :

How long have you been involved in advancement research?

Under one year _____ 2 to 5 years _____
1 to 2 years _____ 5 to 10 years _____
Over 10 years _____

How long have you been involved in charitable fund raising?

Under one year _____ 2 to 5 years _____
1 to 2 years _____ 5 to 10 years _____
Over 10 years _____

Membership:

How long have you been a member of APRA? Under one year _____ 2 to 5 years _____
1 to 2 years _____ 5 to 10 years _____
Charter Member _____

Who pays your APRA dues? Self _____ Employer _____

Educational Background:

High school ___		
Associates Degree ___	Degree(s): _____	Major field(s): _____
Bachelors Degree ___	Degree(s): _____	Major field(s): _____
Masters Degree(s) ___	Degree(s): _____	Major field(s): _____
Doctoral Degree(s) ___	Degree(s): _____	Major field(s): _____
Other Terminal Degree: ___	Degree(s): _____	Major field(s): _____

Which aspects of your training have been most meaningful for your work in an Advancement Research setting:

- ☐ Higher education course work
- ☐ Library Skills workshops or seminars
- ☐ Vendor product training workshops
- ☐ In-house organized formal training programs
- ☐ Personal mentoring relationships
- ☐ Independent reading/study (self-taught)
- ☐ Attending national APRA conferences/seminars
- ☐ Programs of local APRA chapters
- ☐ Training by other professional associations
- ☐ Training by consulting firms
- ☐ Other (please specify:) _____

_____

Employer:

Are you employed full-time in an advancement office: Yes ___ No ___

Please select the category which best describes for whom you work: (Check only one category)

Educational Institution	____	Social Service Organization	____
Environmental Organization	____	Cultural Organization	____
Religious Organization	____	Healthcare Organization	____
Consulting Firm	____	Product Vendor	____

Other: _____

In which state or province do you work? _____
List country if you work outside the U.S. or Canada: _____

Salary and Position Related Questions:

What is your current gross salary level?

Under $24,999	____	$25,000 - $34,999	____
$35,000 - $44,999	____	$45,000 - $54,999	____
$55,000 - $64,999	____	$65,000 or above	____

What is your current title? _____

What is your current level ?

Administrative:	☐Vice President	☐Researcher	☐Assistant Researcher
	☐Director	☐Manager	☐Other: _____
Support staff:	☐Research Assistant	☐Secretary	☐Clerk

Are you the budget manager for the advancement research area? Yes ____ No ____

To whom does the director of research (or similar position) report?

☐Corporate and/or Foundation Director	☐Director of Administration
☐Director of Development	☐Director of Advancement Services
☐Director of Major Gifts/Capital Support	☐Vice President for Advancement/External Affairs

☐Other: _____

Do you work for a non-profit organization? Yes ____ **Answer questions in the Not-For-Profit section**
No ____ **Answer the question in the For-Profit section**

Not-For- Profit Organizations:

What is the annual budget of your research office, including salaries?

☐Under $10,000	☐$10,000 - $24,999	☐$25,000 - $49,999
☐$50,000 - $99,999	☐$100,000 - $249,999	☐$500,000 or above
☐No budget for research	☐Not sure	

What is the annual budget of your development office, including salaries?

☐Under $50,000	☐$50,000 - $99,999	☐$100,000 - $499,999
☐$500,000 - $999,999	☐$1 million - $4,999,999	☐$5 million - under $10 million
☐$10 million or above	☐Not sure	

How much did your research office budget in the current fiscal year for:

Online Services (Dialog, Lexis/Nexis, etc.)	$ _____
Traditional Print Publications	$ _____
Electronic Screening Services	$ _____
Consulting Services	$ _____
Custom Research Services	$ _____
Equipment	$ _____
Software and Software Maintenance Fees	$ _____
Other (please specify): _____	$ _____

How many full-time staff members are employed by your development office?

☐Under 5	☐5 - 15	☐16 - 25	☐26 - 35	☐36 - 45
☐46 - 55	☐56 - 100	☐101 - 299	☐300 or more	☐Not sure

What is the size of your organization's total annual budget, including salaries?

☐Under $500,000	☐$500,000 - $999,999	☐$1 million - $4,999,999
☐$5 million - $9,999,999	☐$10 million - $19,999,999	☐$20 million - $29,999,999
☐$30 million - $39,999,999	☐$40 million - $49,999,999	☐$50 million - $99,999,999
☐$100 million - $499,999,999	☐$500 million or above	☐Not sure

For-Profit Organizations:

If for-profit, what is your company's annual sales revenue?

☐Under $100,000	☐$100,000 - $499,999	☐$500,000 - $999,999
☐$1 million - $4,999,999	☐$5 million - $9,999,999	☐$10 million - $19,999,999
☐$20 million - $49,999,999	☐$50 million - $99,999,999	☐$100 million - $499,999,999
☐$500 million or above	☐Not sure	

General:

Including yourself, how many full-time equivalent researchers are employed in the research office?
None ____ Less than one full time ____ One ____ 2 - 5 _____ 6 - 9 _____ 10 or more _____

How much of your time do you devote exclusively to prospect research?

☐0 - 24% ☐25 - 49% ☐50 - 74% ☐75 - 99% ☐100%

What functions are included under the research for advancement umbrella at your institution:

☐Prospect Research	☐Prospect Screening/Rating	☐Prospect Management/Tracking
☐Computer Support/Reporting	☐Donor Management	☐Database Maintenance/Data Entry
☐Records Management/Filing	☐Gift Processing	☐Donor Stewardship
☐Donor Management Committee	☐Travel Planning Support	☐Supervision/Administration
☐Special Events	☐Correspondence Production	☐Campaign Management

☐Other (please specify): _____
_____
_____

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Please state the length of your average work week (not including travel time):

☐1 - 10 hours ☐11 - 20 hours ☐21 - 30 hours ☐31 - 40 hours ☐41 - 50 hours ☐Over 50 hours

Does your institution have a written ethics statement for Advancement Research? ☐Yes ☐No
If no, why? Not needed____ Time constraints ____ Use APRA Statement____ Other _____

Does your research or Advancement Services department have formal procedures manuals? ☐Yes ☐No
If no, why? Not needed _____ Time constraints _____ Other _____

Who is responsible for the documentation of centralized database management systems in your office?
(Check as many as apply.)

☐Institutions Computing Center ☐Advancement Research Staff
☐ Advancement Services Staff ☐Other: _____

How many full-time equivalent staff members work in your advancement services and research areas?:

Professional level:_____ Support staff:_____

Who has access to confidential information? (Check as many as apply.)

☐All development office staff members ☐Anyone with access to files, including students
☐Judged on a case-by-case basis ☐Key volunteers, including trustees
☐Organization's senior officers ☐Research staff only
☐Research office and development officer responsible for the prospect
☐Highly confidential information is withheld form the files altogether
☐Other (please specify): _____

My general attitude toward APRA is: (Please check only one item.)

☐Very positive ☐Positive ☐ Neutral ☐ Negative ☐ Very Negative

What is APRA's greatest service to you? (Please rank, with 1 being the most important.)

___ Networking ___ Educational Opportunities ___ Job Opportunities
___ *Bulletin* ___ Professional Development ___ Professional Recognition
___ *Connections* ___ Other: _____

Besides APRA, do you belong to other professional organizations? ☐ Yes ☐ No

If yes, please specify.

____ AHP - Association for Heathcare Philanthropy
____ AIIP - Association of Independent Information Professionals
____ ALA - American Library Association
____ ARMA - American Record Management Association
____ CASE - Council for the Advancement and Support of Education
____ NEDRA - New England Development Research Association
____ NSFRE - National Society of Fund Raising Executives
____ SLA - Special Libraries Association
____ SAA - Society of American Archivists
____ chapter State or Local APRA group
____ Other: _____

APPENDIX G

Association of Professional Researches for Advancement

1997 Internet Use Survey

Internet Use

Does your office have Internet access: ☐Yes ☐No

Which of the following services or programs do you use to access the Internet:

Direct Institutional Access: ☐Netscape Navigator ☐Microsoft Explorer ☐Lynx ☐ Mosaic
☐Other: _____

Other Providers: ☐Prodigy ☐America On Line ☐CompuServe ☐NetCom
☐Local Internet Service Provider ☐Other:_____

Please list the numbers of hours per week you spend on the Internet for the following purposes:

	less than 1	1 - 5	6 - 10	11 - 15	16 - 20	more than 20
All work related purposes (including prospect research):	☐	☐	☐	☐	☐	☐
Advancement research related purposes only:	☐	☐	☐	☐	☐	☐
Personal information needs or enjoyment:	☐	☐	☐	☐	☐	☐

For which of the following do you find Internet resources useful (check as many as apply):
Please rate each item on a scale of 1 to 5 with 1 = very useful and 5 = not useful. If you have never used the Internet for this purpose please mark N/A.

1 2 3 4 5	N/A	
☐☐☐☐☐	☐	Finding individual addresses
☐☐☐☐☐	☐	Finding individual telephone numbers
☐☐☐☐☐	☐	Finding biographical information
☐☐☐☐☐	☐	Finding corporate addresses and telephone numbers
☐☐☐☐☐	☐	Finding other types of information about corporations
☐☐☐☐☐	☐	Finding foundation addresses and telephone numbers
☐☐☐☐☐	☐	Finding other types of information about foundations
☐☐☐☐☐	☐	Using specific customized mapping programs to view/print specific local area maps
☐☐☐☐☐	☐	Confirming travel information
☐☐☐☐☐	☐	Determining stock quotations
☐☐☐☐☐	☐	Reviewing online journals like *Information Prospector*
☐☐☐☐☐	☐	Reviewing online newspapers
☐☐☐☐☐	☐	Accessing online public access library catalogs
☐☐☐☐☐	☐	Accessing other electronic references available through library sites (databases, etc.)
☐☐☐☐☐	☐	Accessing public records, including proxies, property information, etc.
☐☐☐☐☐	☐	Accessing census data
☐☐☐☐☐	☐	Confirming zip or area code information
☐☐☐☐☐	☐	Using research oriented webpages as a spring board to other useful sites
☐☐☐☐☐	☐	Professional development through listservs and bulletin boards
☐☐☐☐☐	☐	General reference searching
☐☐☐☐☐	☐	Other (please specify):_____

Which of the following Internet search engines do you use on a regular basis (check as many as apply):

☐Alta Vista ☐Excite ☐Webcrawler ☐Yahoo! ☐ Infoseek ☐Lycos ☐Magellan
☐ IBM infoMarket ☐The Electric Library ☐Other: _____

Which two search engines do you use most frequently and why?

Search Engine _____

☐Comprehensiveness ☐Subject Index ☐Rated Scores ☐Special Search Features
☐Other (please specify): _____

Search Engine _____

☐Comprehensiveness ☐Subject Index ☐Rated Scores ☐Special Search Features
☐Other (please specify): _____

To which of the following listservs do you subscribe or monitor regularly?

	Subscribe	Monitor	Archive Search	Do Not Use
ALUMNI-L	☐	☐	☐	☐
BUSLIB-L	☐	☐	☐	☐
CFRNET	☐	☐	☐	☐
GIFT-PL	☐	☐	☐	☐
FUNDCAN	☐	☐	☐	☐
FUNDLIST	☐	☐	☐	☐
FUNDSVCS	☐	☐	☐	☐
PRSPCT-L	☐	☐	☐	☐
Other:				
_____	☐	☐	☐	☐
_____	☐	☐	☐	☐
_____	☐	☐	☐	☐

List in descending order up to ten favorite Internet sites, with number one as your favorite site.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

General comments about the use of the Internet in advancement research:

APPENDIX H

Association of Professional Researches for Advancement

APRA 1998 Mini-Survey

APRA 1998 MINI-SURVEY

One of the benefits of membership in the Association of Professional Researchers for Advancement is the publications that are mailed to members. We would like to determine how well we are meeting your needs through these materials. Salary and general APRA questions are also included so that we can continue to gather relevant demographic data to share with you. Please complete both sides of the survey and **mail or fax back to APRA by 11/20/98**. Survey responses are anonymous. Thank you for your assistance in helping APRA serve you.

PUBLICATIONS

1. How long do you typically spend reading each of the following APRA publications?

	1-15 minutes	15-30 minutes	30-60 minutes	More than an hour	Did not read
Connections					
Bulletin					
Resource Manual					
Membership Survey Results (1/98)					
Research Skills Sets (4/98)					
Annual Report (6/98)					

2. How many people, besides yourself, have read your copy of the following APRA publications? (If "0", please fill in.)

Connections _____ Resource Manual_____ Research Skills Sets _____
Bulletin _____ Annual Report _____ Membership Survey Results _____

3. How long do you keep the following APRA publications?

	1 week	1 month	1 year	Indefinitely	Don't keep
Connections					
Bulletin					
Resource Manual					
Membership Survey Results (1/98)					
Research Skills Sets (4/98)					
Annual Report (6/98)					

4. Do you notice the advertisements in APRA publications?
___ Yes ___ No

5. How important are the following regular columns published in Connections?

	Very Important	Somewhat Important	Not Very Important	Do Not Publish
This Issue				
Ethics				
Site-ings on the Net				
Slightly Skewed				
From the Board				

6. Please list any comments regarding APRA publications (including Connections theme or column ideas) here.

_____

_____

_____

_____

_____

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SALARY/DEMOGRAPHIC INFORMATION

7. How long have you worked in the area of research/development?
   ___ Less than one year ___ 3 - 5 years ___ Over 10 years
   ___ 1 – 2 years ___ 6 - 10 years

8. How long have you been a member of APRA?
   ___ Less than one year ___ 3 - 5 years ___ Over 10 years
   ___ 1 – 2 years ___ 6 - 10 years

9. What is your current gross salary level?
   ___ Under $24,999 ___ $35,000 - $44,999 ___ $55,000 - $64,999
   ___ $25,000 - $34,999 ___ $45,000 – $54,999 ___ $65,000 or higher

10. What is your title?
   ___ Campaign Coordinator ___ Director of Prospect Research
   ___ Development Associate ___ Prospect Researcher
   ___ Development Officer ___ Research Assistant
   ___ Development Research Analyst ___ University Librarian
   ___ Director of Development ___ Other (Please list)_____

11. Are you the budget manager for the advancement research area? ___ Yes ___ No

12. To whom does the director of research (or similar position) report?
   ___ Director of Development
   ___ Vice President for Advancement/External Affairs
   ___ Director of Advancement Services
   ___ Director of Major Gifts/Capital Support
   ___ Corporate and/or Foundation Director
   ___ Other (Please list) _____

13. Please check the category that best describes your organization.
   ___ Public Higher Education ___ Social Service
   ___ Private Higher Education ___ Religious
   ___ Other Education ___ Consulting Firm
   ___ The Arts ___ Product Vendor
   ___ Health Care

GENERAL INFORMATION

14. What time of the year is best for you to attend a conference?
   ___ Summer (June – August) ___Winter (December – February)
   ___ Fall (September – November) ___ Spring (March – May)

15. Would you like to see APRA select two or three permanent geographical venues for its annual conference?
   ___ Yes ___ No

16. Are you most likely to attend an APRA Conference:
   ___ Within your geographic region ___ Outside your geographic region ___ Location does not affect decision

17. How do you most benefit from your membership in APRA? (Please choose one.)
   ___ Education opportunities (conferences)
   ___ Professional development (chapter leader, presenter, volunteer)
   ___ Networking
   ___ Publications
   ___ Mentoring Program
   ___ Other (Please list) _____

Please return this survey by 11/20/98 to:
APRA – 414 Plaza Drive, Suite 209 – Westmont, IL 60559
Fax: 630-655-0391

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